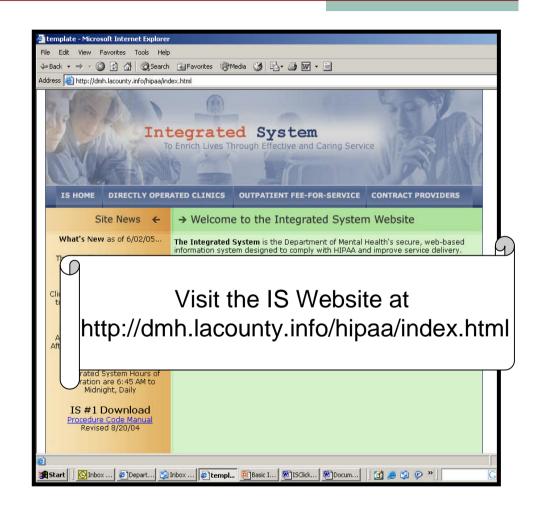
Basic Integrated System (IS) Training

Things to Keep in Mind

- All Patient Health Information (PHI), in this manual, is fictitious.
- Remember to use the help (?) icon.
- It is recommended that you understand the billing processes before using the IS.
- To return to the previous screen, always click on the Return button, under Options.
- Italicized fields must be completed.
- Dates must be entered as: 00/00/0000
- You will be logged off every 15 minutes when not using the system; you will have to click on the Home page to log back in.
- It is strongly recommended that you attend the PATS training on medications.
- You only have access to the Home and Clinical pages of the System
- MIS, IS, and DMH number are all the same.



Basic IS Training

- 1. Log in
- 2. Find a Client
- 3. Add a Client: Identification Screen
- 4. Add a Client: Contacts Screen
- 5. Add a Client: Financial Screen
- 6. Add a Client: Other Screen
- 7. Open an Episode: Admission Screen
- 8. Open an Episode: Diagnosis Screen
- 9. Add Services
- 10. Add a Claim, a Plan and Payer (s)
- 11. Void and Replace a Claim
- 12. Add a Prescription: Rx Card Info, Drug Allergies Screens
- 13. Add a Prescription: Med Order and Write Rx Screens
- 14. Add a Prescription: Approval, Renew and Refill
- 15. Close an Open Episode: Discharge and Diagnosis Screens
- 16. Groups
- 17. Community Outreached Services (COS)

Use Keyboard Shortcuts! Avoid using the Mouse.

- The Tab key will take you through every field on the screen.
- Shift-Tab will take you backwards through those fields.
- Down Arrows and characters to go through drop-down lists.
- The Space bar will check and uncheck boxes.
- The Enter key will activate buttons.

EXERCISE 1

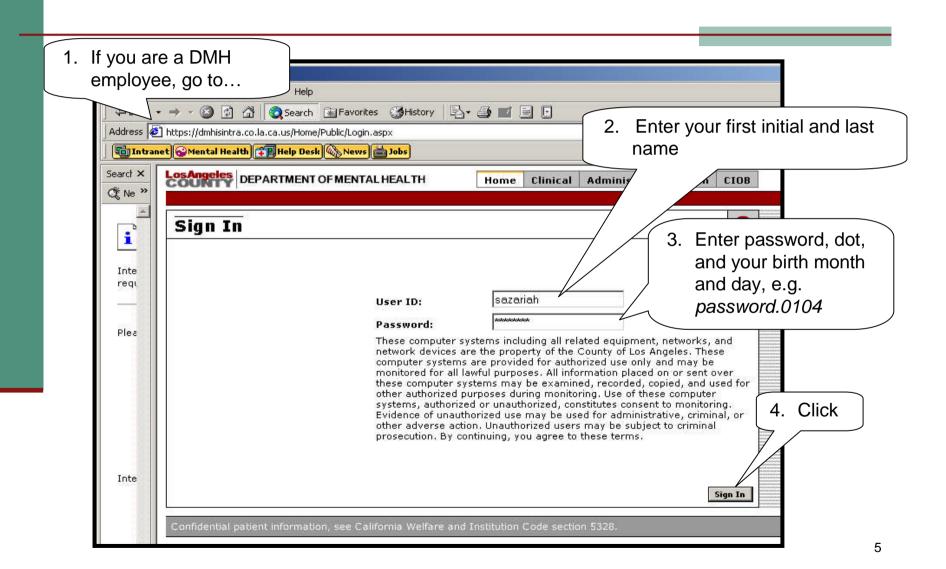
Log In:

- As a DMH Employee: <u>https://dmhisintra.co.la.ca.us</u>
- As a DMH Contracted Provider: http://dmh.lacounty.info/hippa/index.html
- The Home Page
- How to Set Provider Context

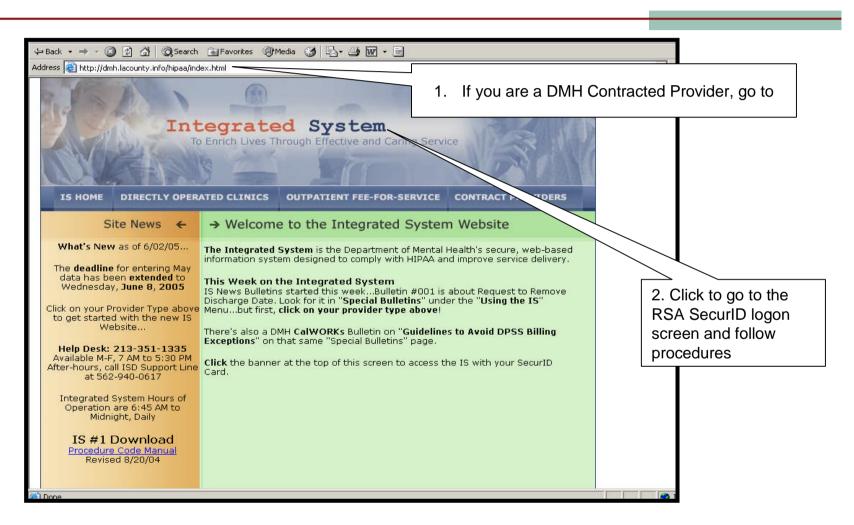
Note:

- If you are a first time user, you will be asked to change your password.
- You will then be prompted to a privacy policy statement. Click accept to proceed.

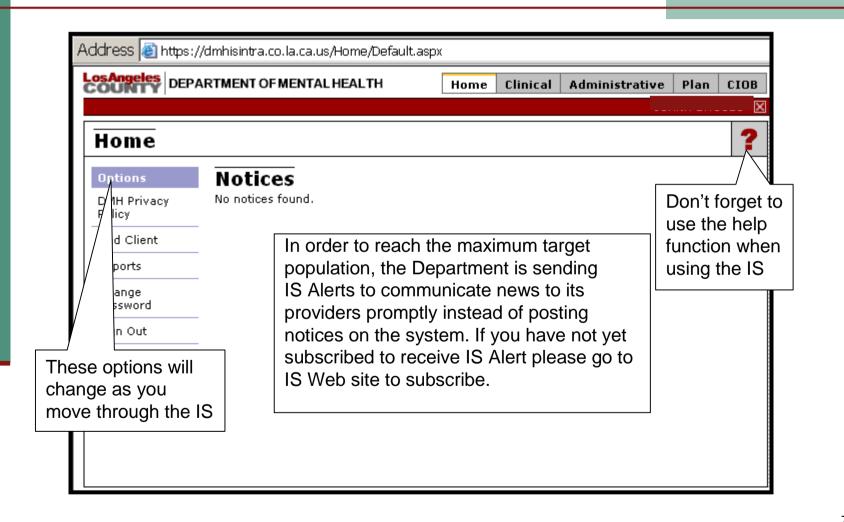
Log In – DMH Workers



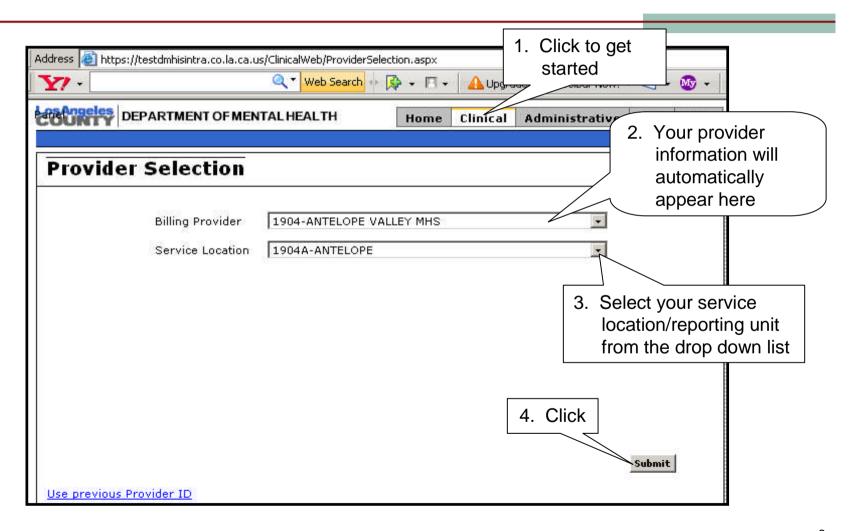
Log In with a SecurID Card



The Home Screen



How to Set Provider Context

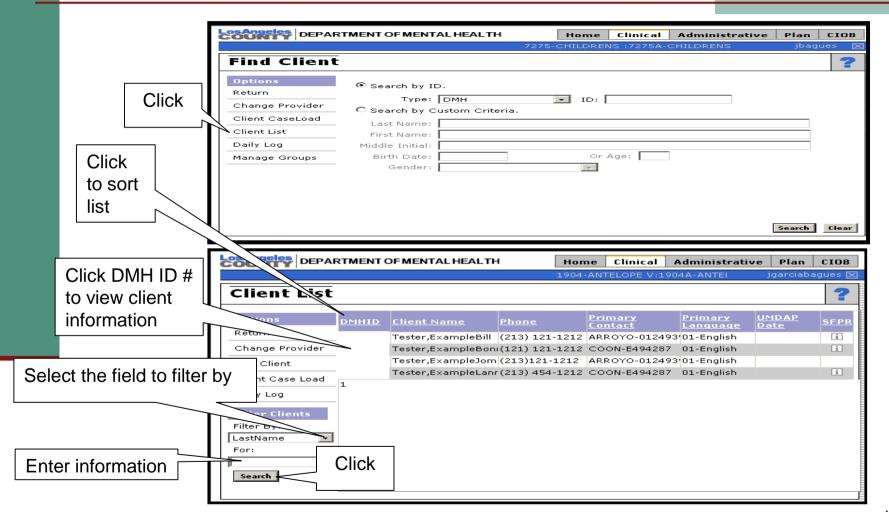


EXERCISE 2

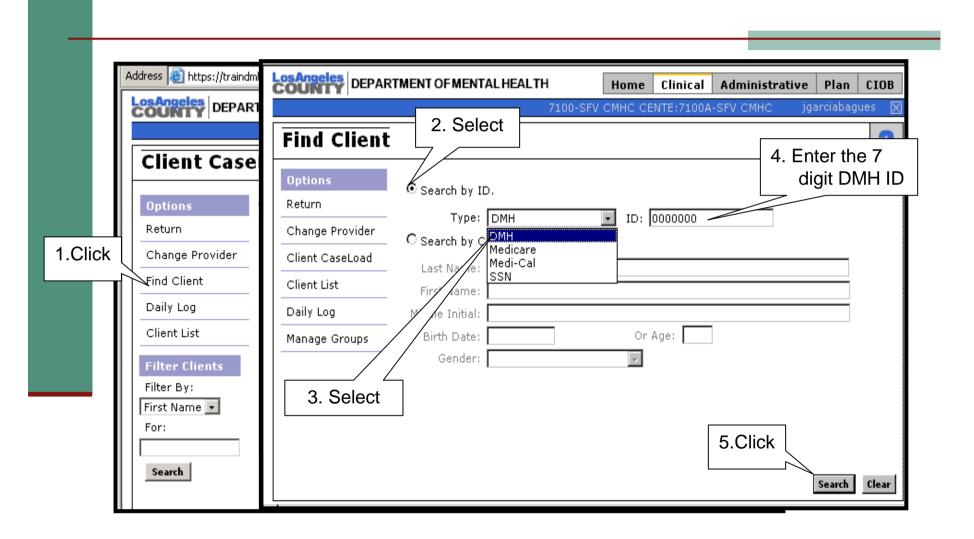
Find a Client:

- Using Client List and Filter Clients
- Using Search by ID
- Using Search by Custom Criteria
- Result Screen

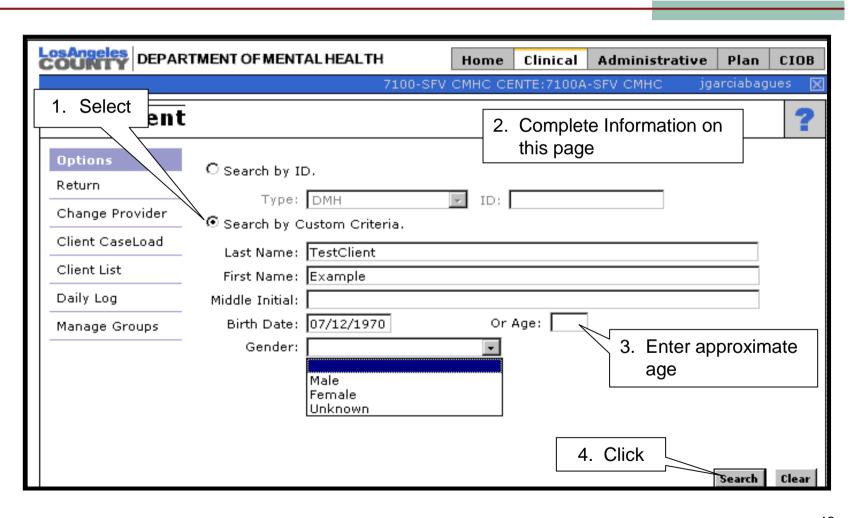
Find a Client: Using Client List and Filter Clients



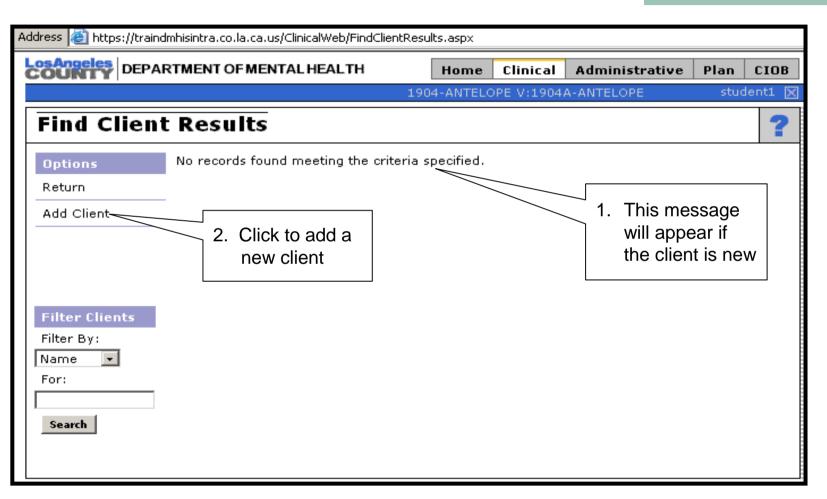
Find a Client: Using Search by ID



Find a Client: Using Search by Custom Criteria



Find a Client: Results Screen



EXERCISE 3

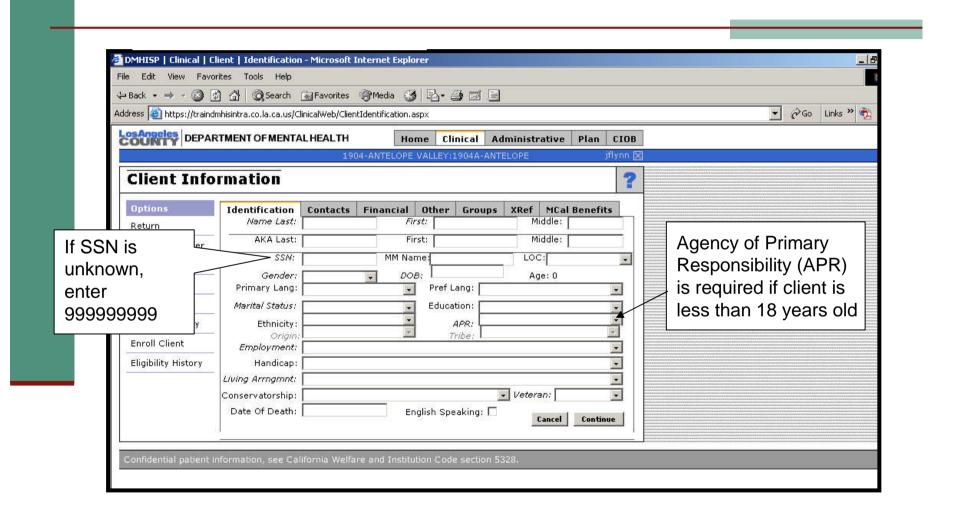
Add a Client: Identification Screen

Enter Client Information

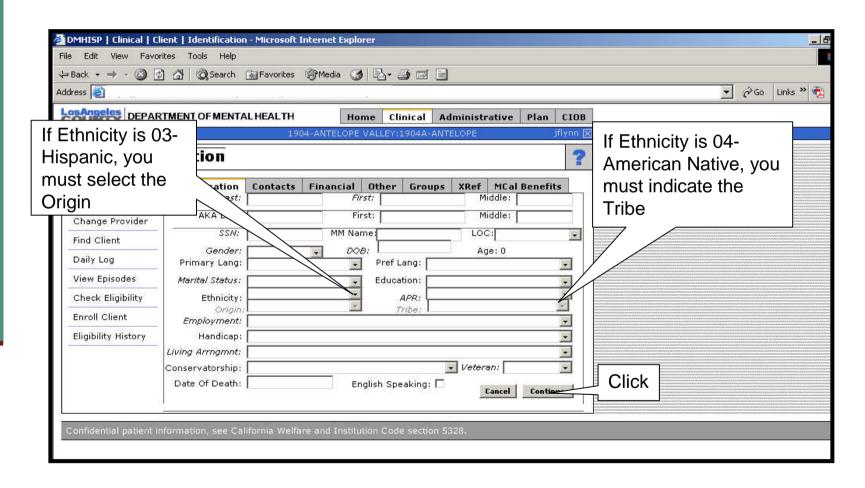
Note:

- You must first do a Client Search, before adding a new client.
- The system will bring-up the option to add a client only if a client does not exist.

Add a Client: Information



Add a Client: Ethnicity

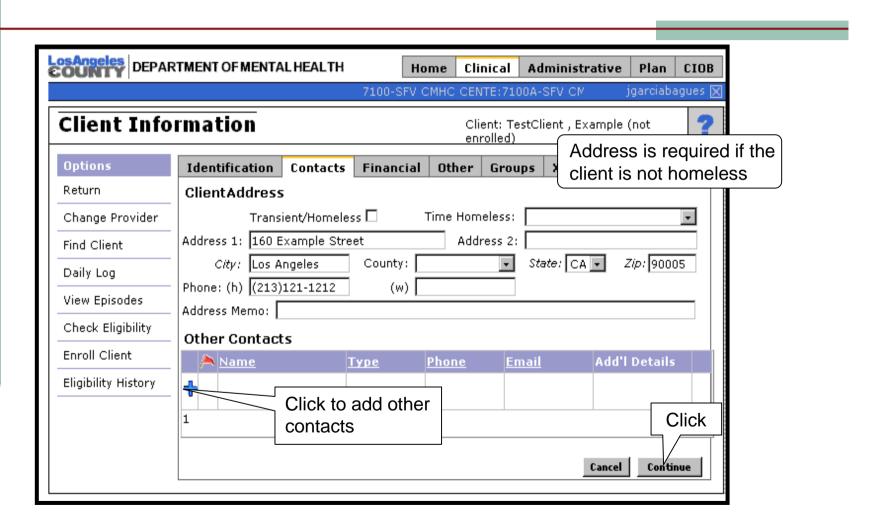


EXERCISE 4

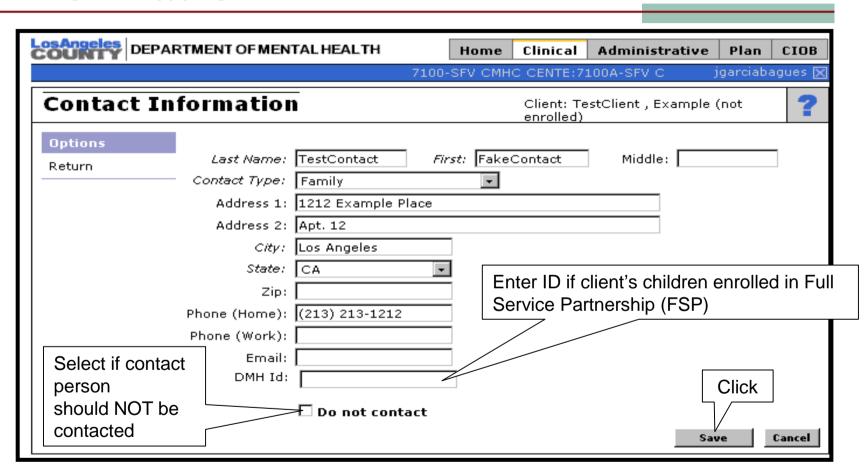
Add a Client: Contacts Screen

- Enter Client's Contact Information
- Enter Client's Other Contact (s) Information
- Edit Client's Other Contact (s) information

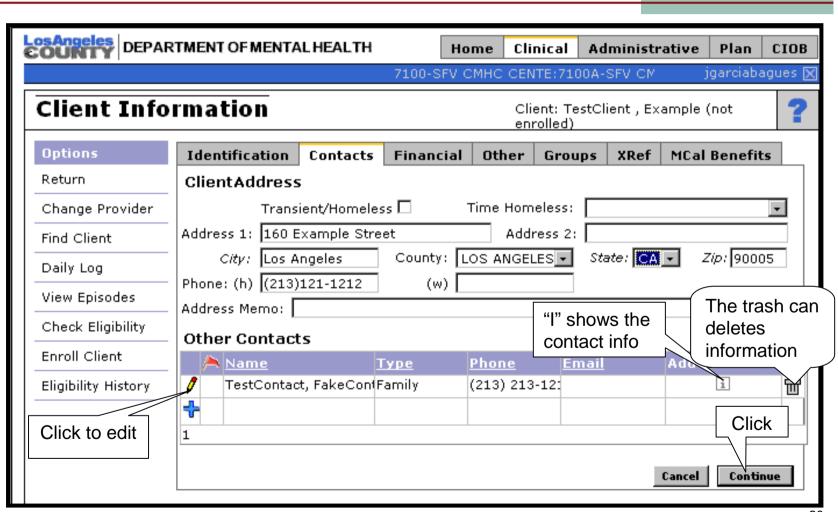
Add a Client: Contact Information



Add Client: Other Contact (s) Information



Add a Client: Edit Other Contact Information

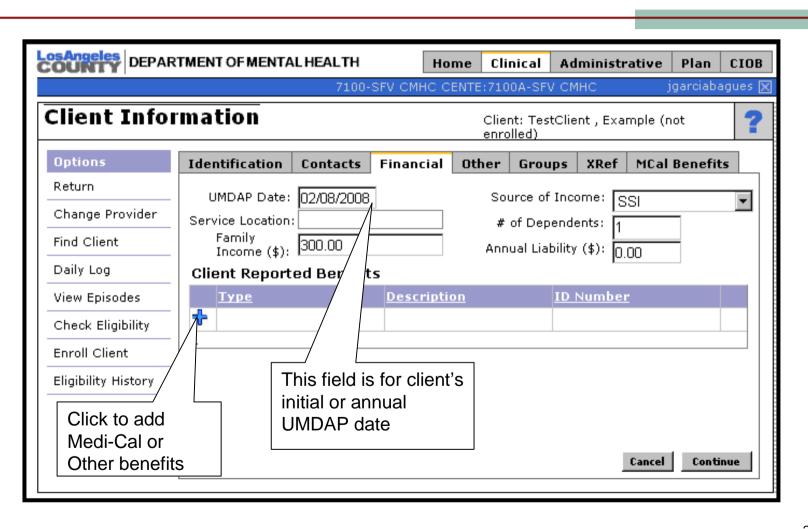


EXERCISE 5

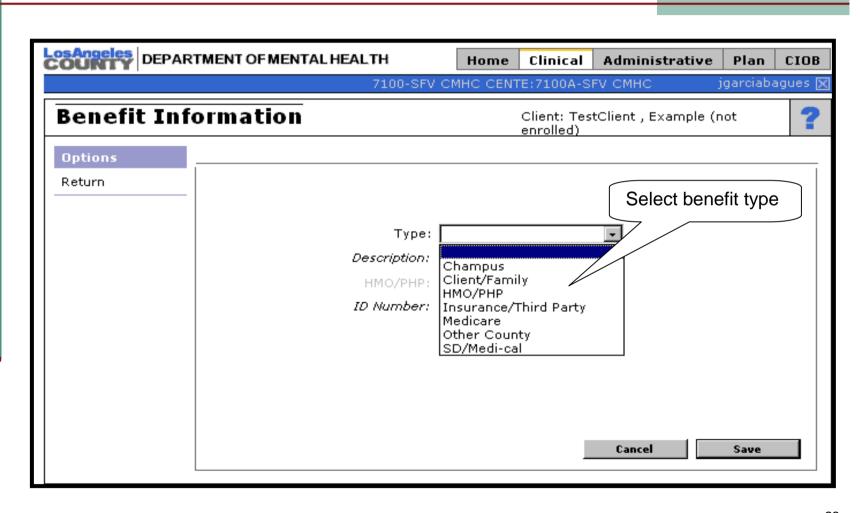
Add a Client: Financial Screen

- Enter Client's Financial Information
- Enter Client's Benefit Type
- Enter Client's Benefit Information

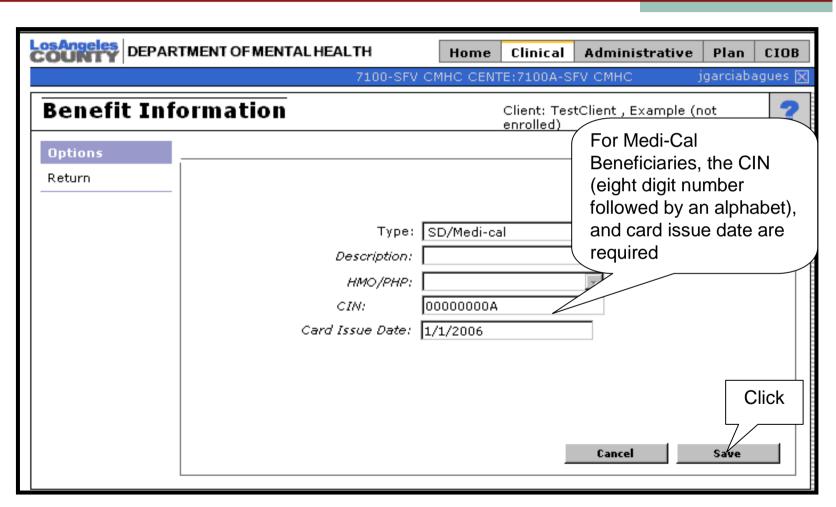
Add a Client: Financial Information



Add a Client: Benefit Information

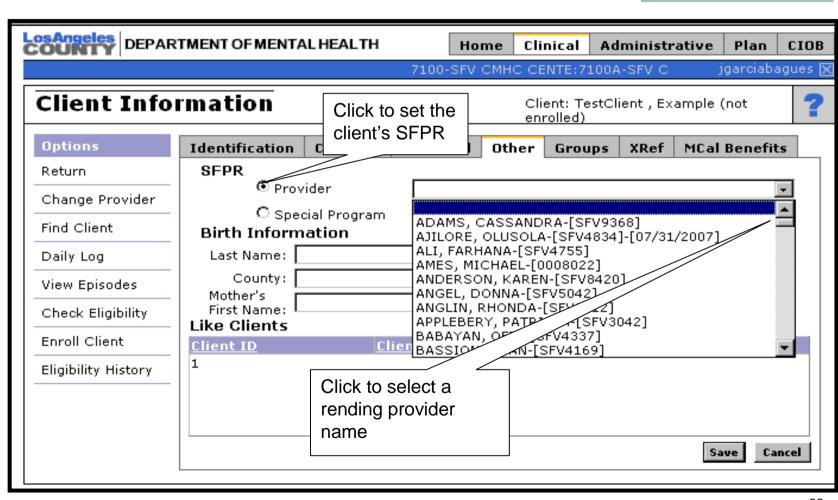


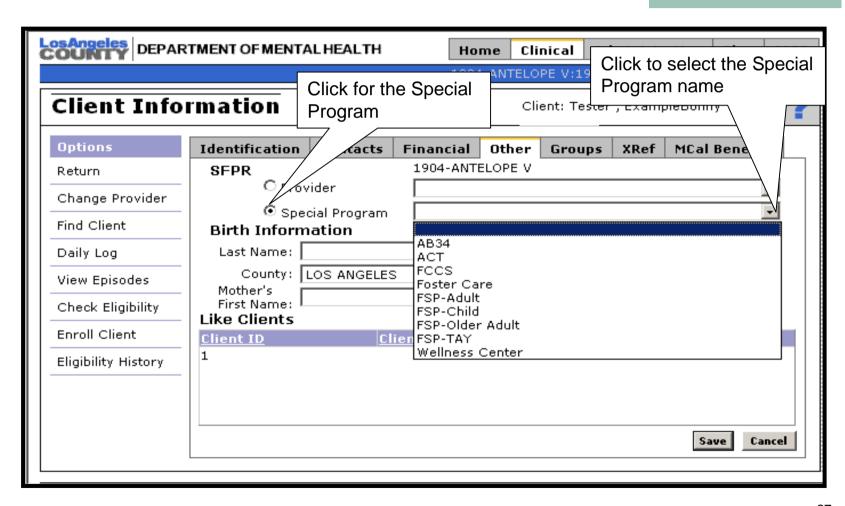
Add a Client: Benefit Information

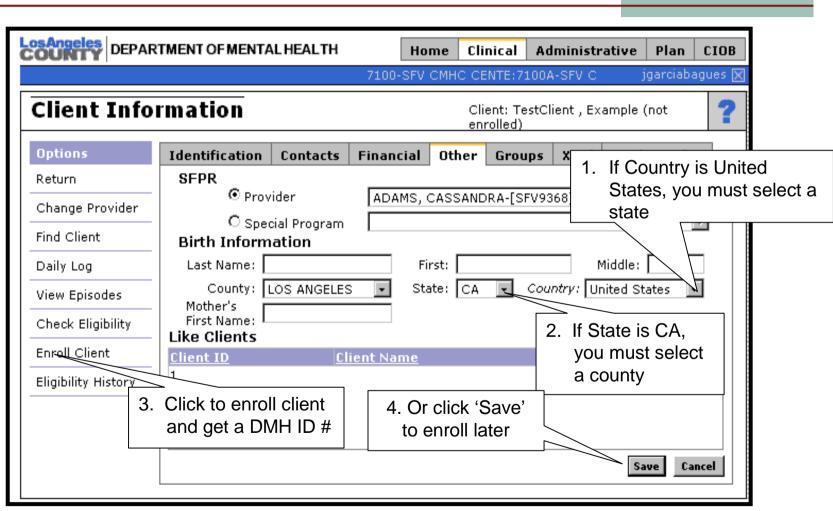


EXERCISE 6

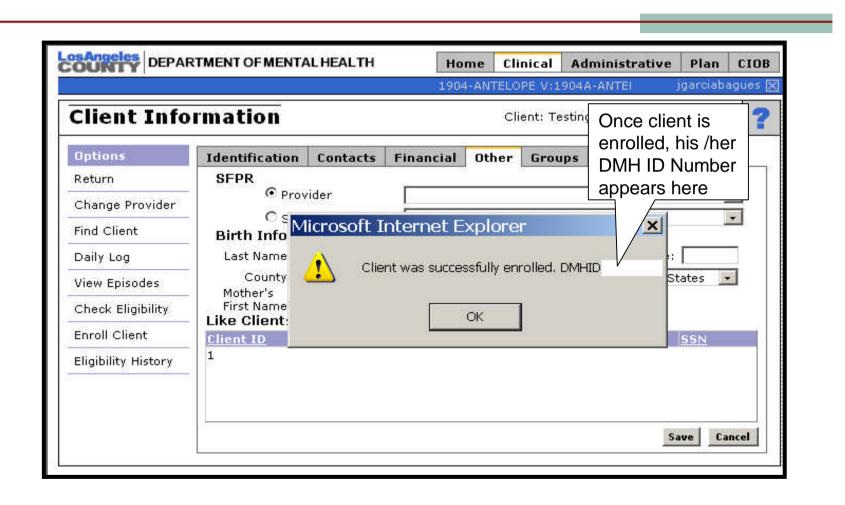
- Set the Single Fixed Point of Responsibility (SFPR) or Special Program
- Save the Client Information
- Enroll Client
- Check Eligibility



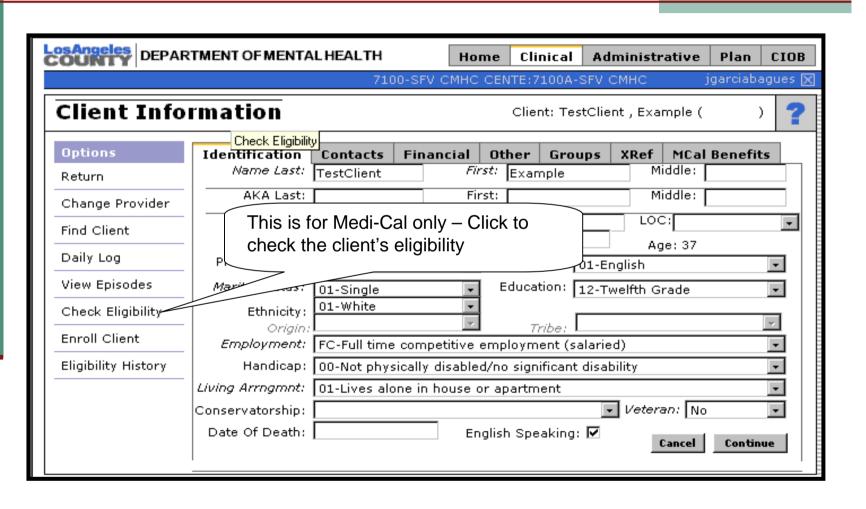




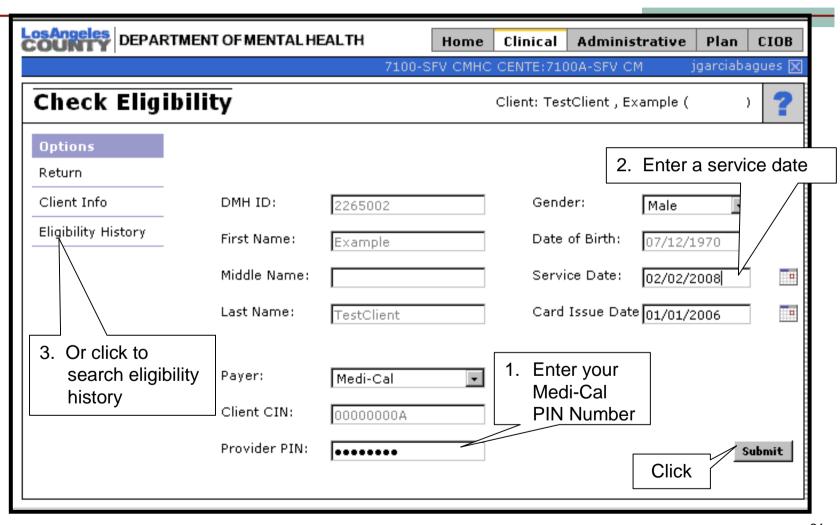
Enroll a Client



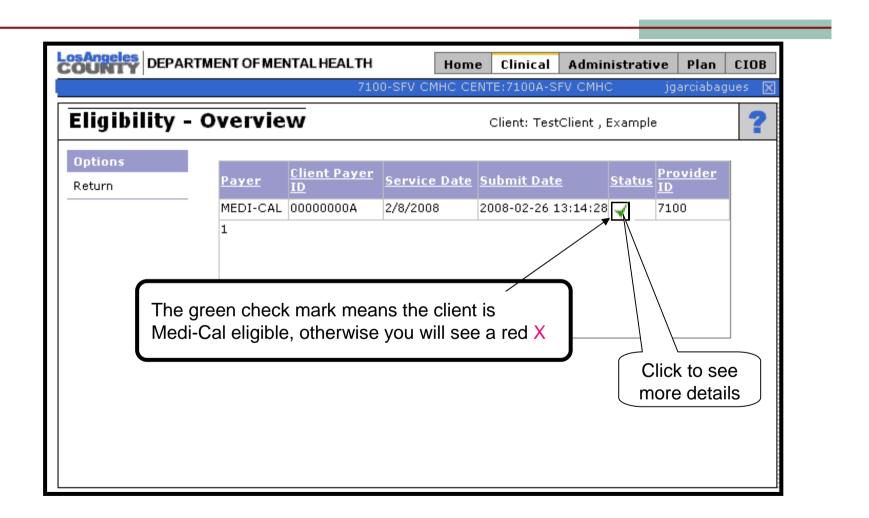
Check Eligibility



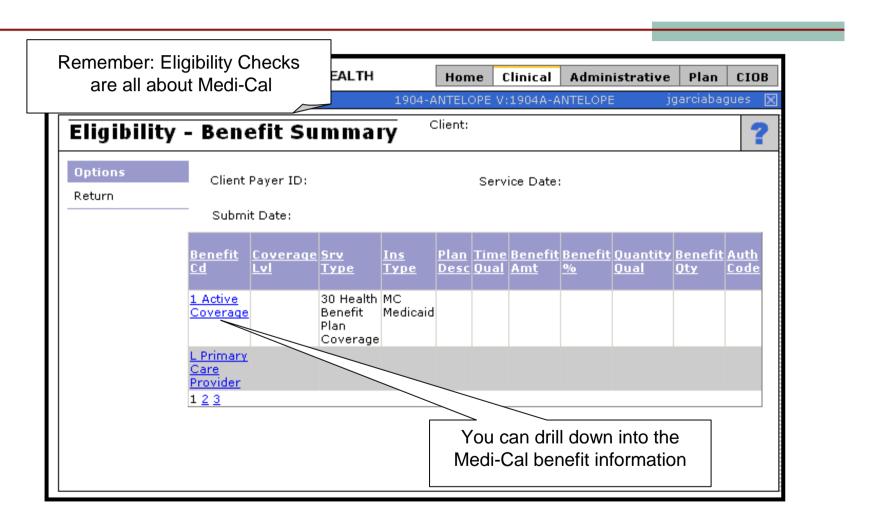
Check Eligibility



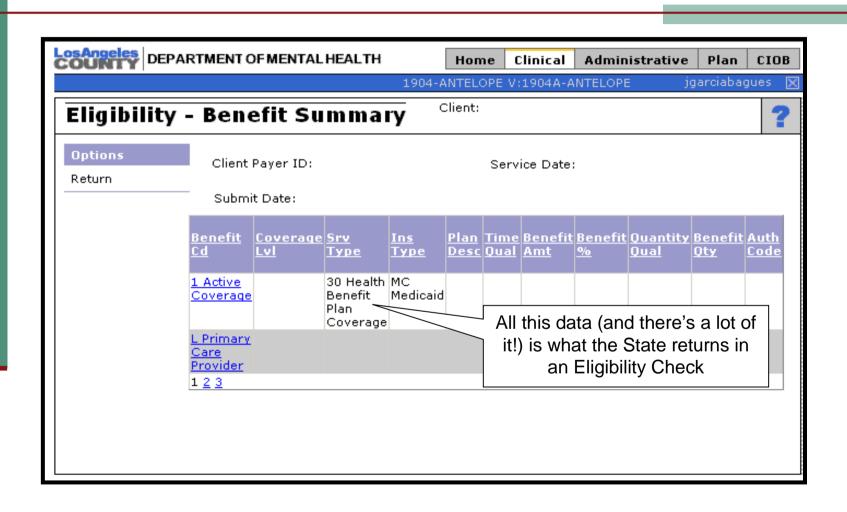
Check Eligibility



Eligibility



Eligibility History

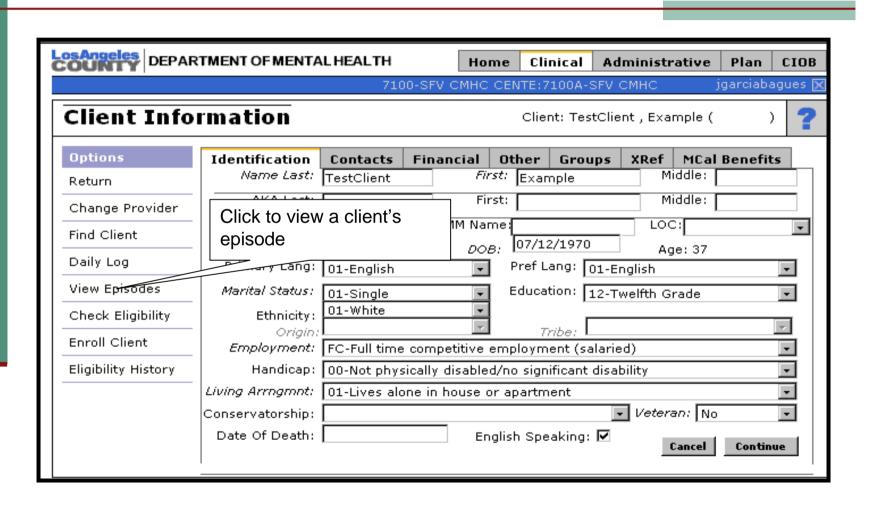


EXERCISE 7

Open an Episode:

Complete Admission Screen

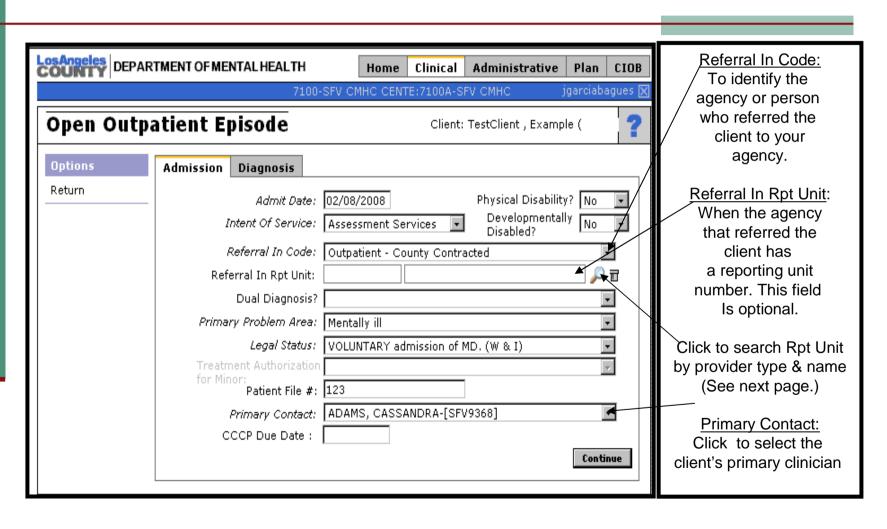
Open an Episode: Admission Screen



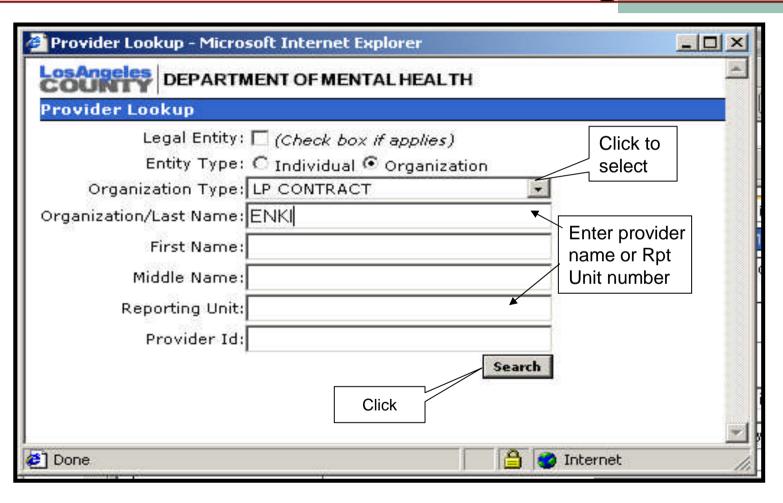
Open an Episode: Admission Screen



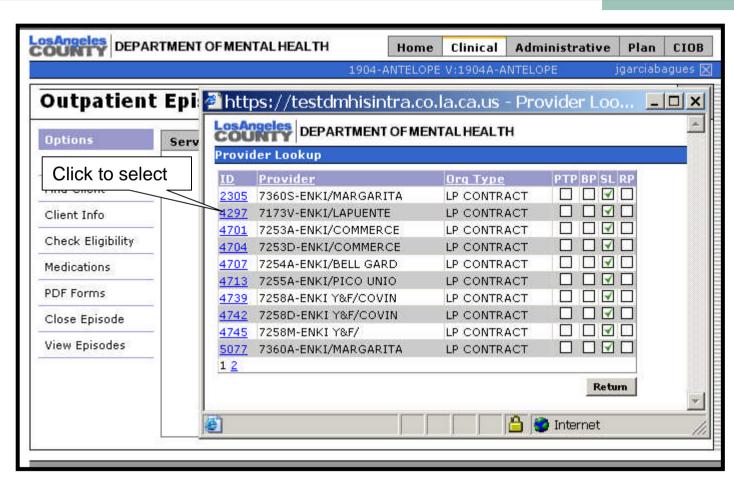
Open an Episode: Admission Screen



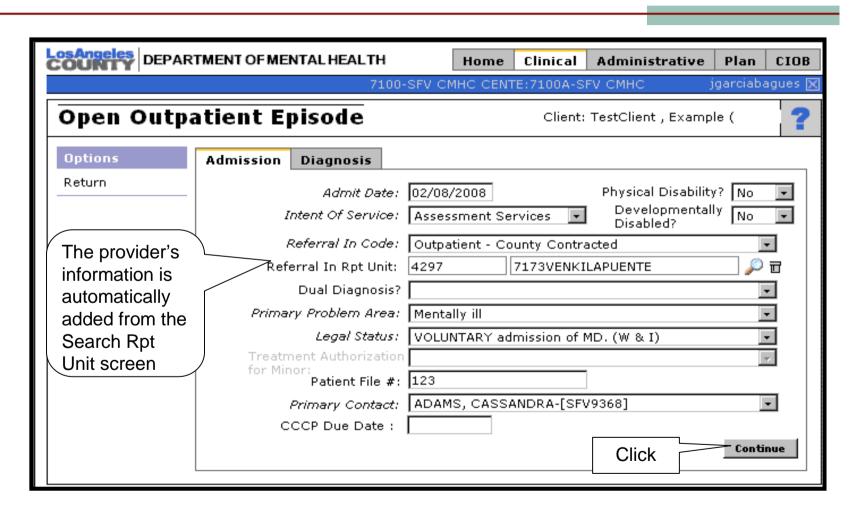
Open an Episode: Admission Screen Search Rpt Unit



Open an Episode: Admission Screen Search Rpt Unit (Cont.)



Open an Episode: Admission Screen.

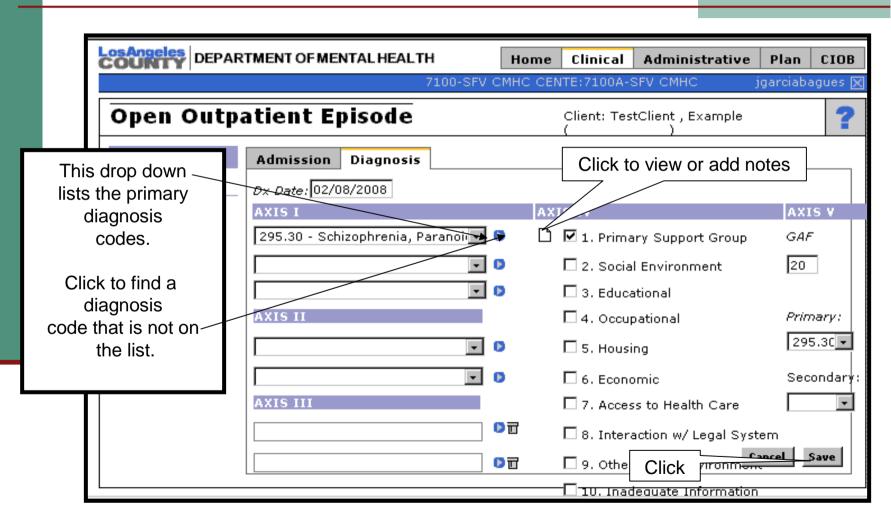


EXERCISE 8

Open an Episode:

Complete the Diagnosis Screen

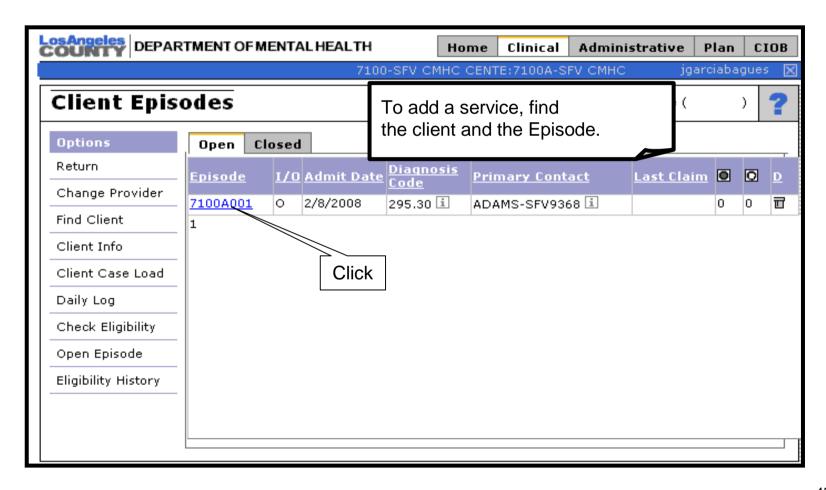
Open an Episode: Diagnosis Screen

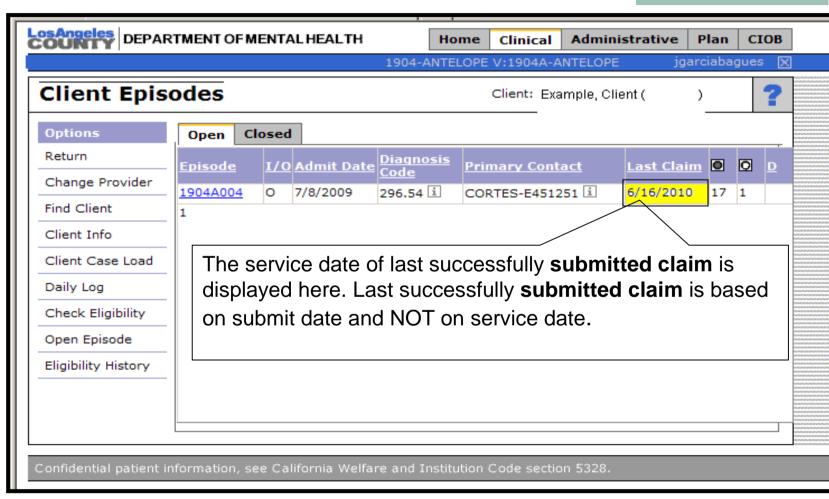


EXERCISE 9

Add Services

Notes on Evidence Based Practice

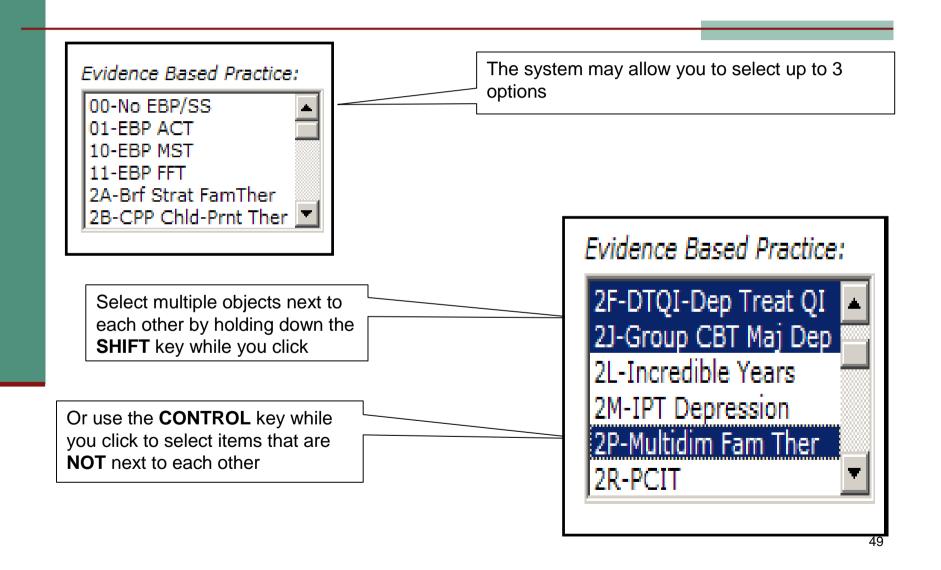


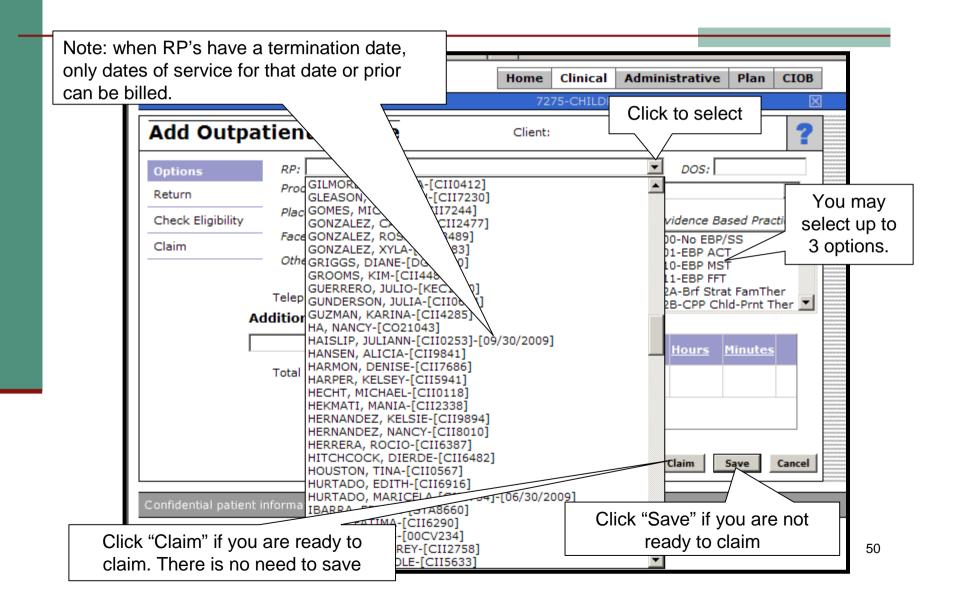


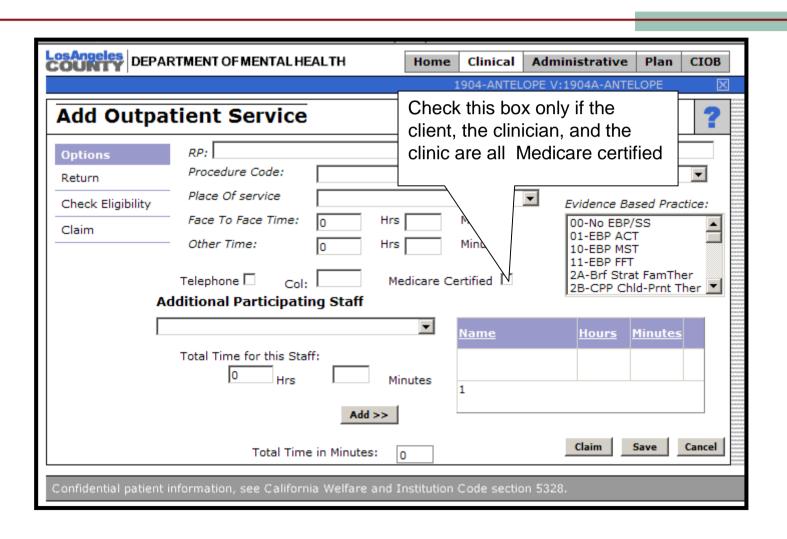


■ What is Evidence-Based Practice/Service Strategies/PEI Services?

They are techniques that use research results, reasoning, and best practices to inform the improvement of Mental Health Care. DMH is now using the IS to track the use of these techniques. These are some examples: Multisystemic Therapy, Functional Family Therapy, Brief Strategic Family Therapy, Functional Family Therapy, Peer and/or Family Delivered Services, Family Support









EXERCISE 10

Add a Claim:

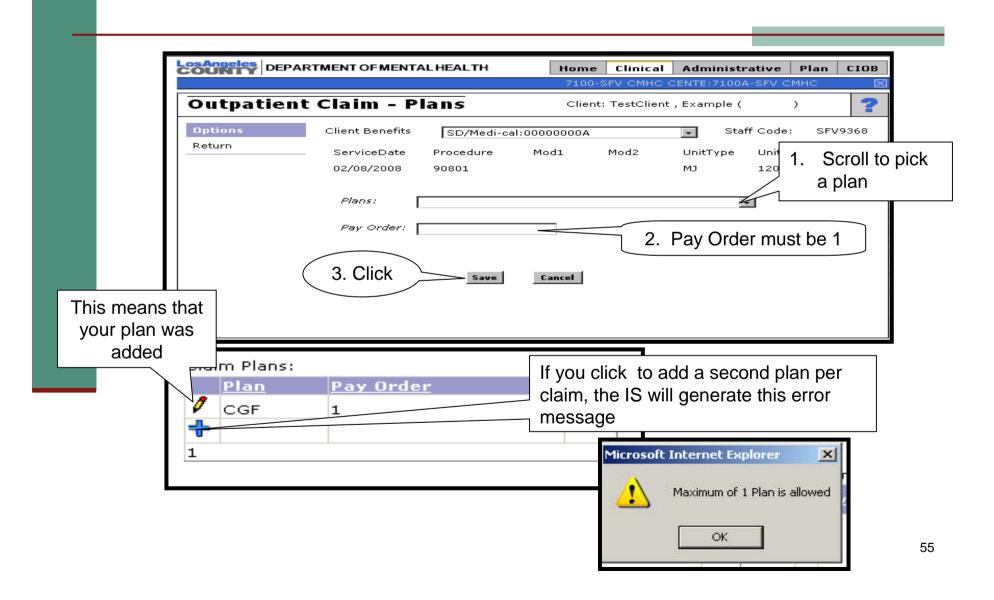
- Add a Plan
- Add Payers
- Claim Status Icons under "S" Column in Episode Screen

Add a Claim: Add a Plan

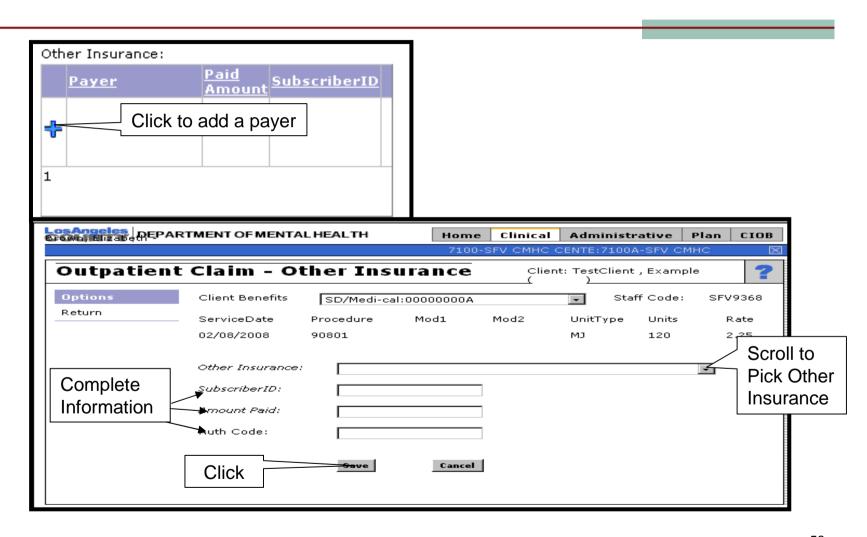
screen, you will be prompted to this screen to pick a plan and a payer. DEPARTMENT OF MENTAL HEALTH annical Administrative Plan CIOB 100-SFV CMHC CENTE:7100A-SFV CMHC Add Outpatient Claim Client:TestClient,Example Staff Code: SFV9368 Client Benefits SD/Medi-cal:00000000A Options Service Date Procedure Mod1 Mod2 Unit Type Units Rate Return 02/08/2008 90801 MJ. 120 2.25 Check Eligibility Claim Amount: 270.00 Late Service Code: Client Amt Paid: EVC: Medi-Cal □ Amount Paid: Healthy Families \Box Medicare 🔲 Claim Plans: Other Insurance: Pay Order SubscriberID Plan <u>Payer</u> Click to add a plan Plan and Other Insurance are here. Submit Save Cancel (see the next screen for info. on these two items) 54

Once you click Claim on the Add Service

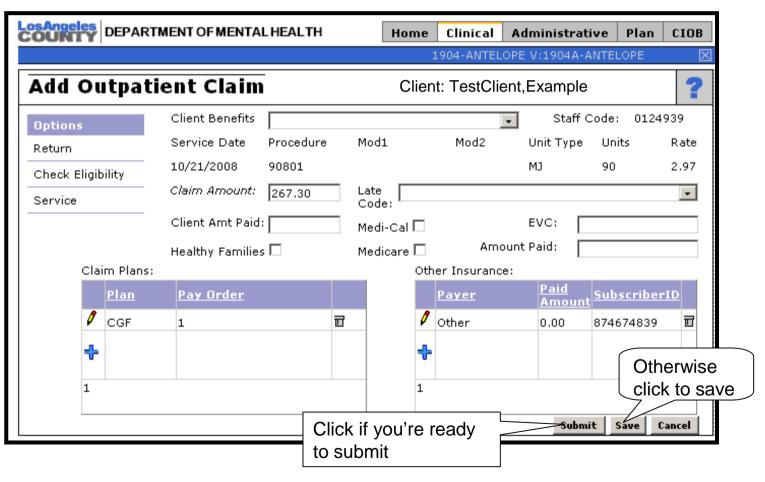
Add a Claim: Add a Plan



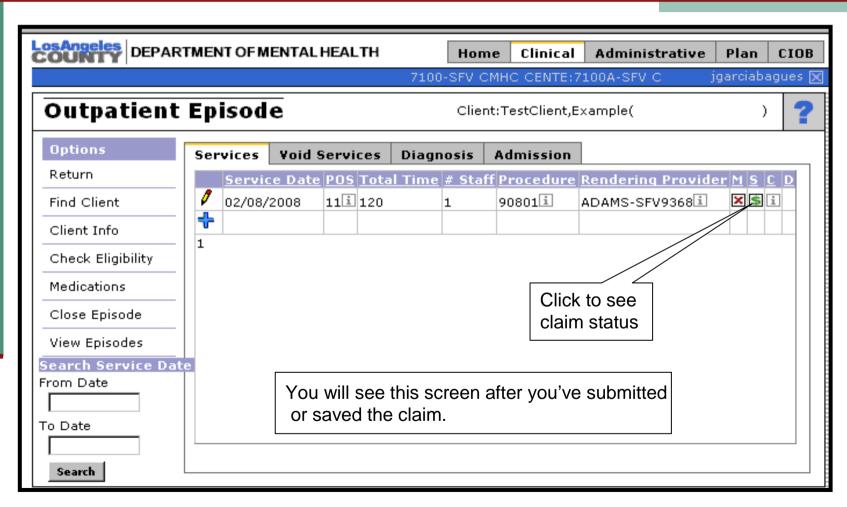
Add a Claim: Add a Payer



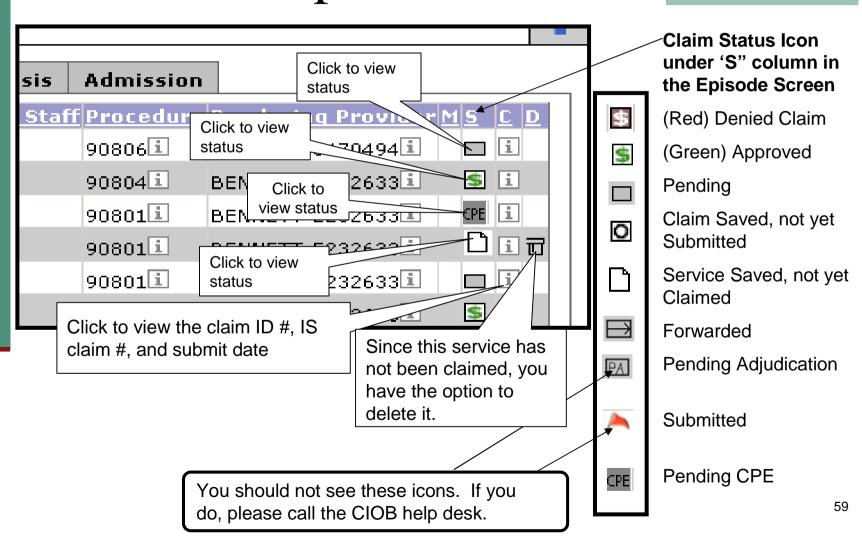
Add a Claim



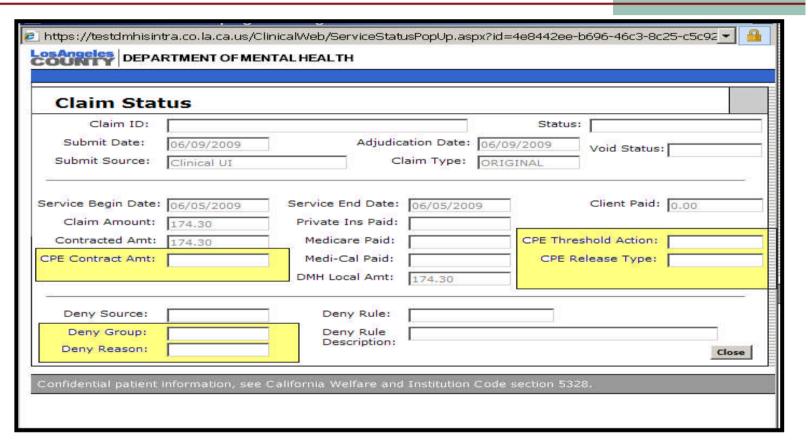
Add a Claim



Claim Status Icons Under "S" Column in Episode Screen



Sample of Claim Status with new added CPE Fields

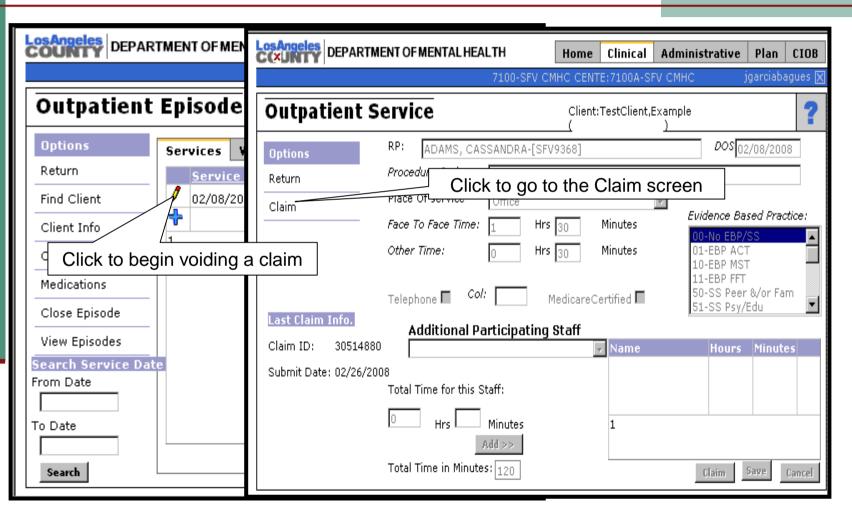


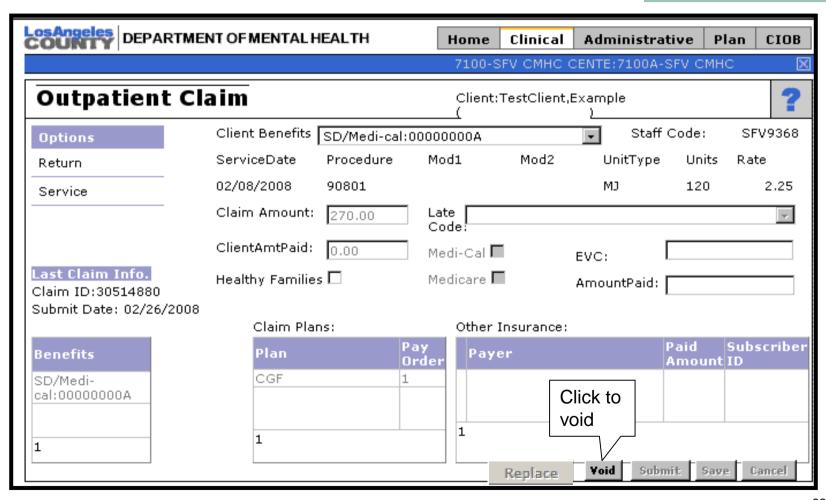
highlighted fields are the new added fields

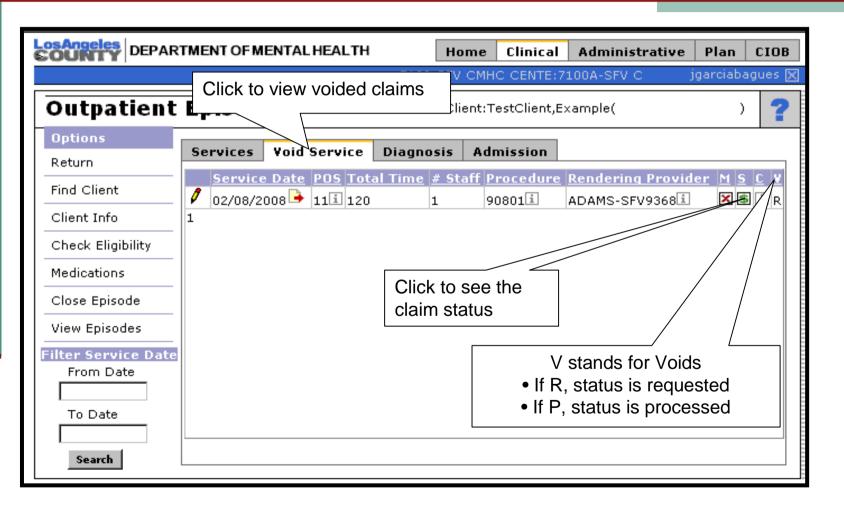
EXERCISE 11

Void and Replace:

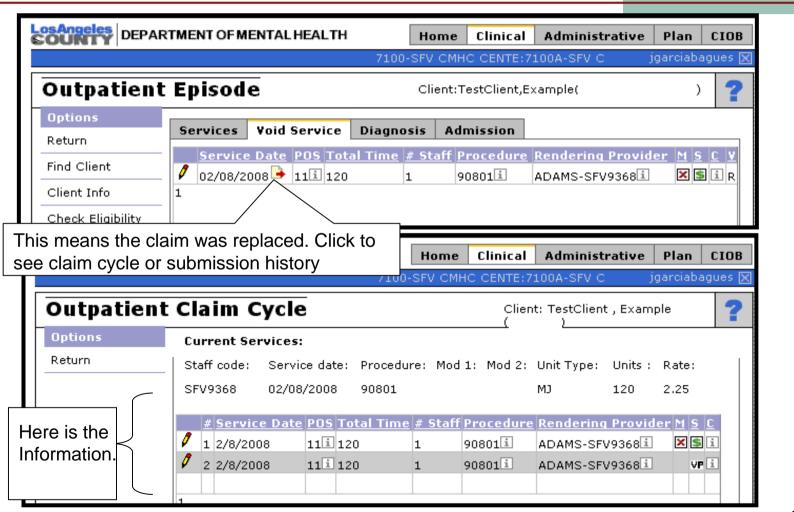
- Void a Claim
- Replace a Claim



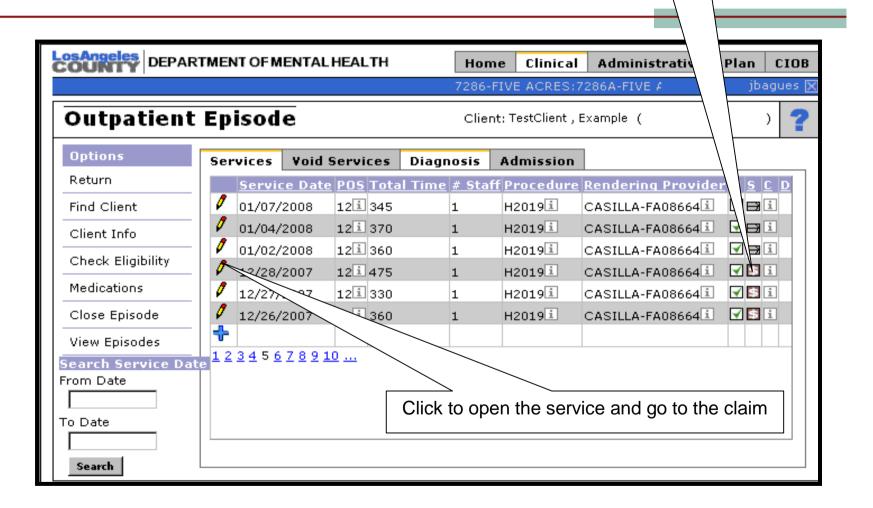


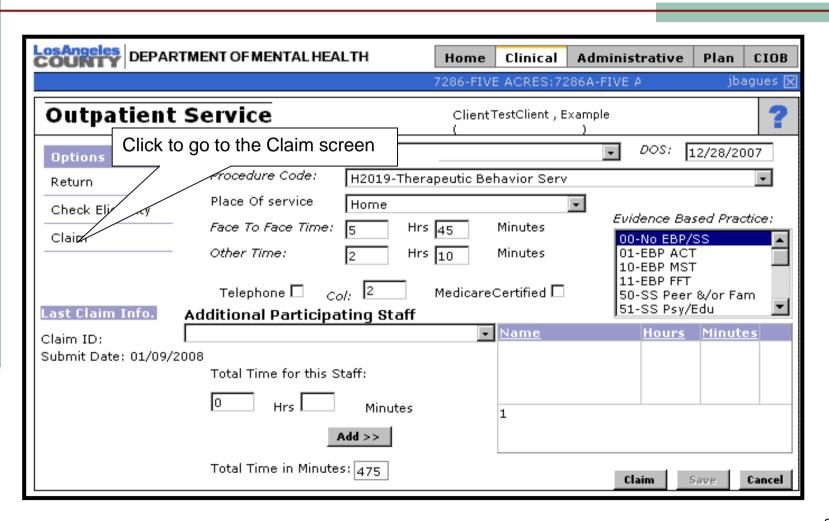


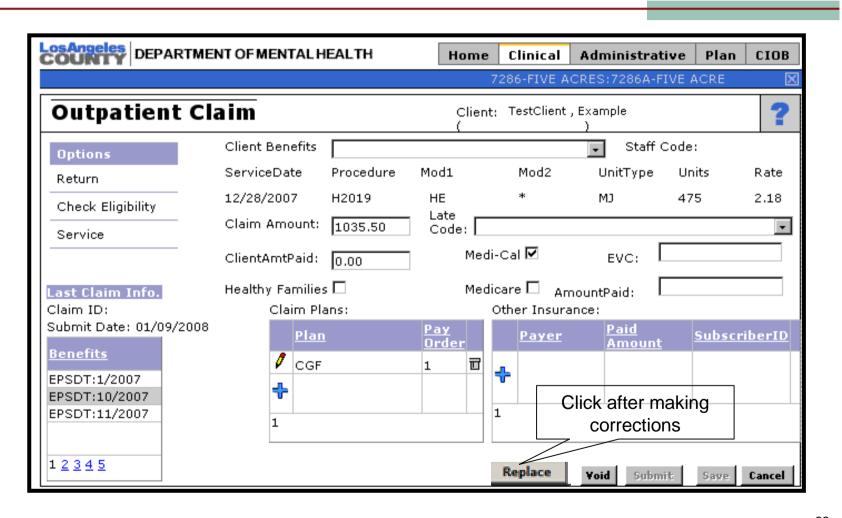
Claim Status Web	Page Dialog	The claim was requested
COUNTY DEPA	The claim has been approve	
Claim Stat	tus	
Claim ID:	30514880	Status: APPROVED
Submit Date:	02/26/2008 Adjudication Dat	e: 02/26/2008 Void Status: REQUESTED
Submit Source:	Clinical UI Claim Type	: ORIGINAL REQUESTED
Service Begin Date:	02/08/2008 Service End Date: 02/08/2	008 Client Paid: 0,00
Claim Amount:	270.00 Private Ins Paid:	
Contracted Amt:	270.00 Medicare Paid:	
	Medi-Cal Paid:	
	DMH Local Amt: 270.00	
Deny Source:	Deny Rule:	
	Deny Rule Description:	
		Close
Confidential patient	information, see California Welfare and Institution	on Code section 5328.

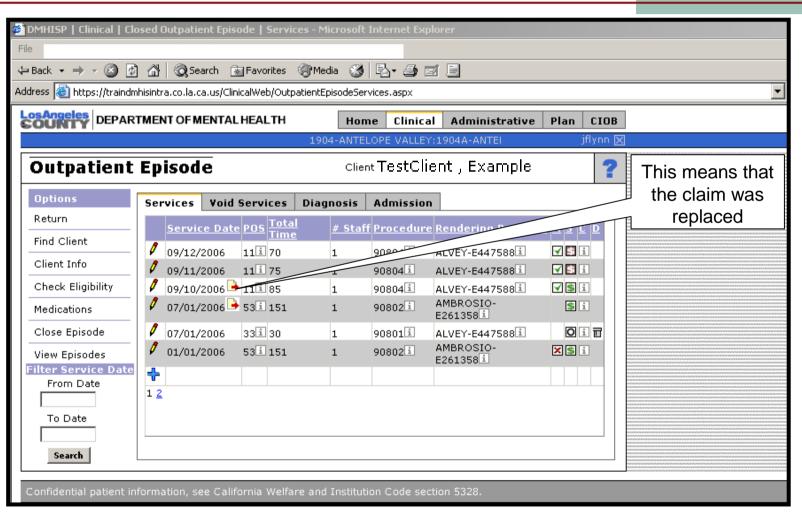


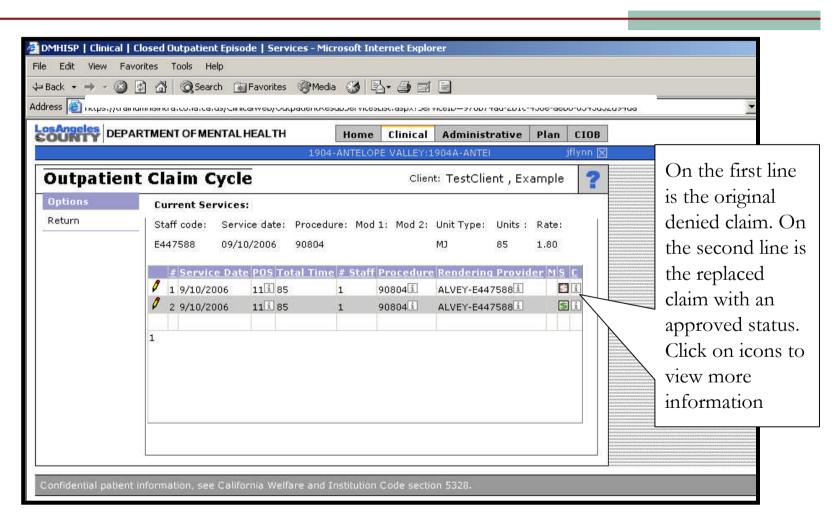
This means the claim is denied and can be replaced.









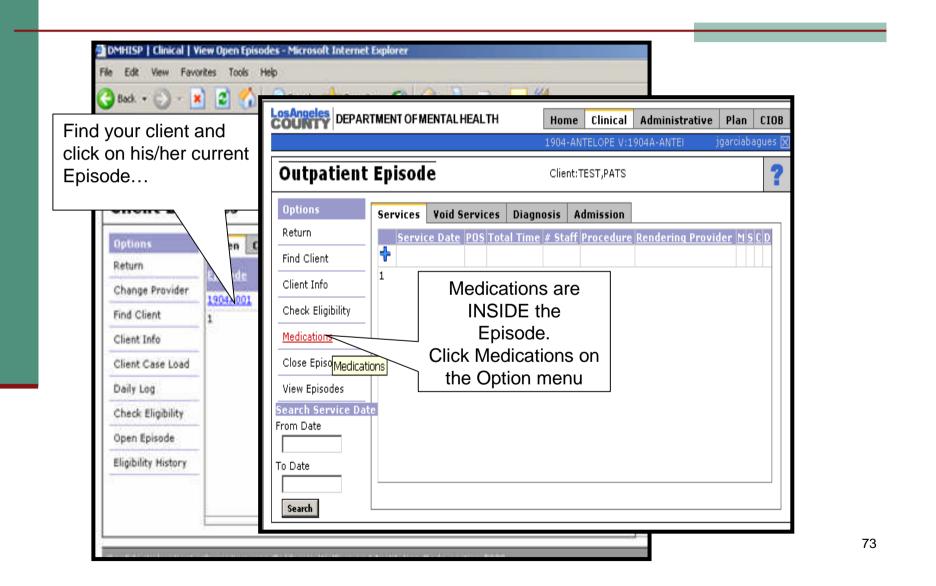


EXERCISE 12

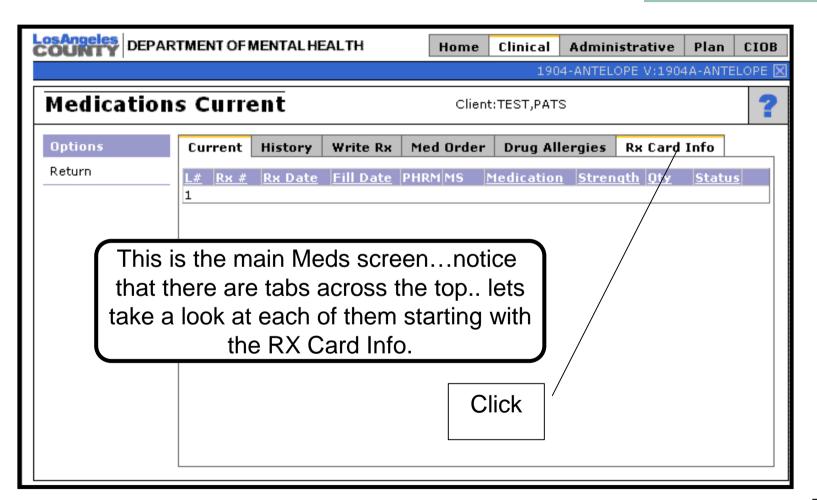
Prescribing Medications:

- Go to the Medications Screen
- Issue an RX Card Number
- Enter Drug Allergies

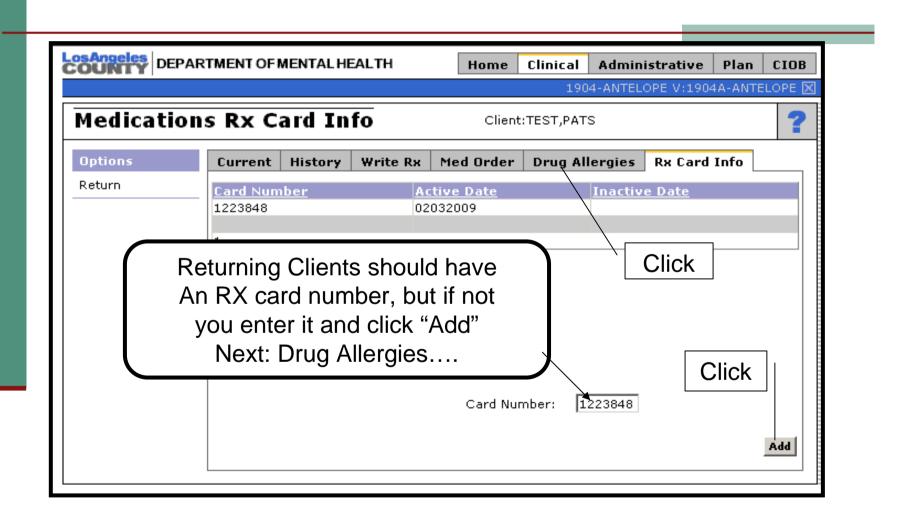
The Medications Screen



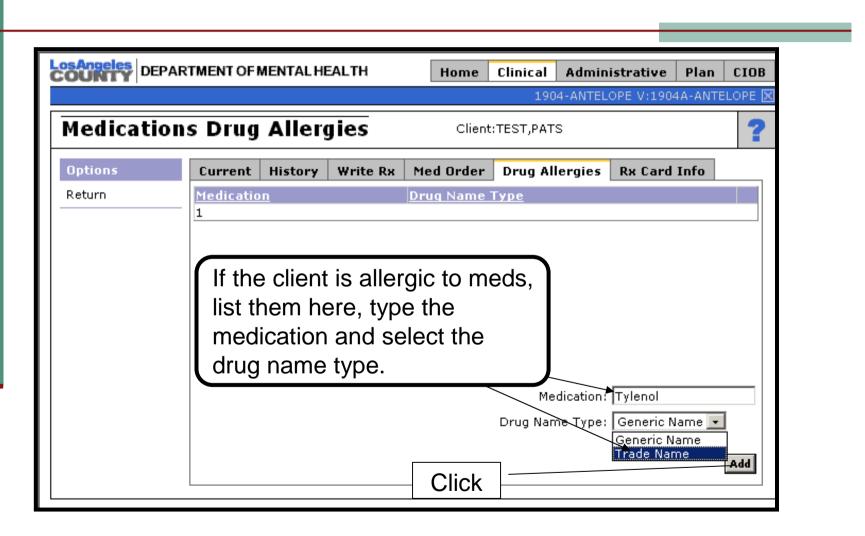
Prescribing Medications



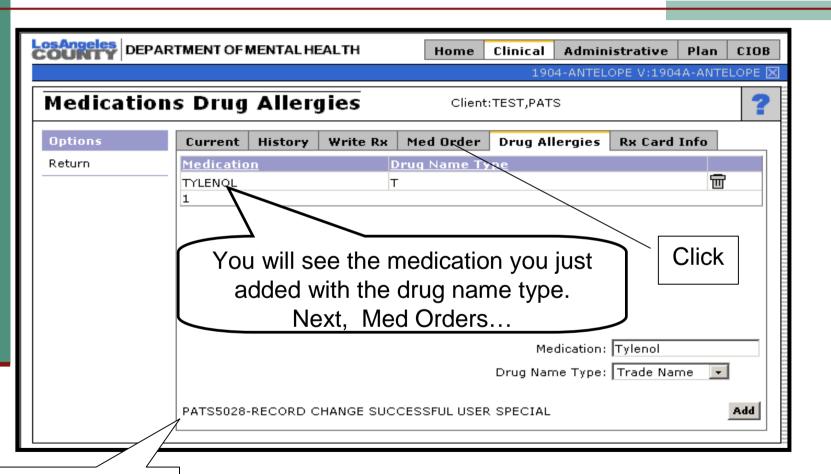
Prescribing Medications: Rx Card



Prescribing Medications: Allergies



Prescribing Medications: Allergies



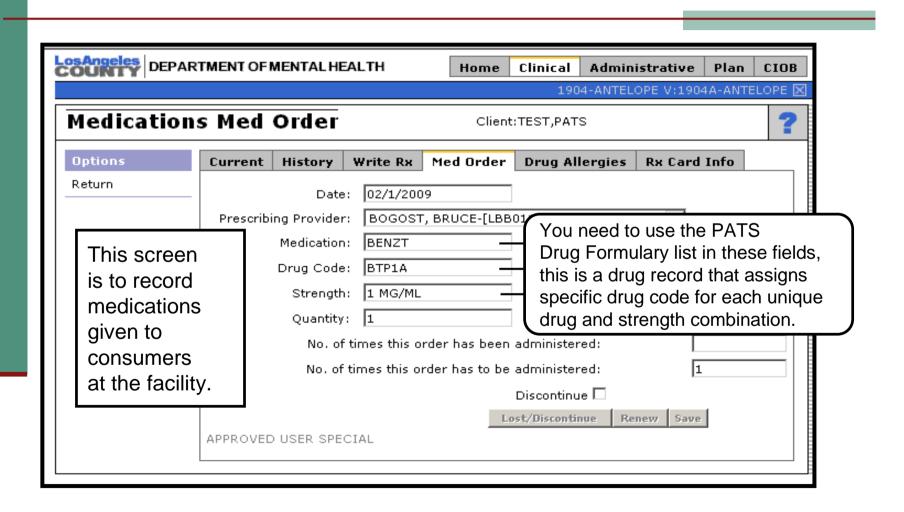
Edit messages are displayed here!

EXERCISE 13

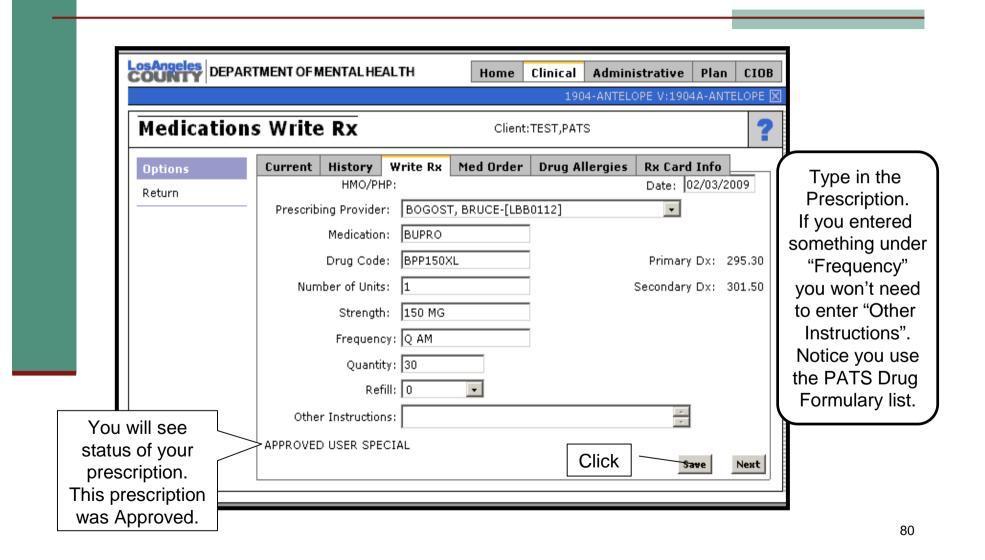
Prescribing Medications:

- Add Medications in Med Order
- Write Rx

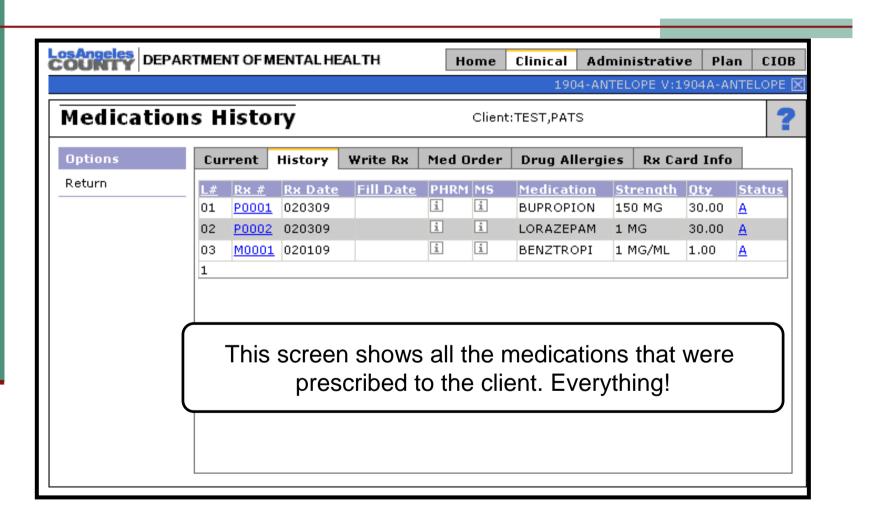
Prescribing Medications: Med Orders



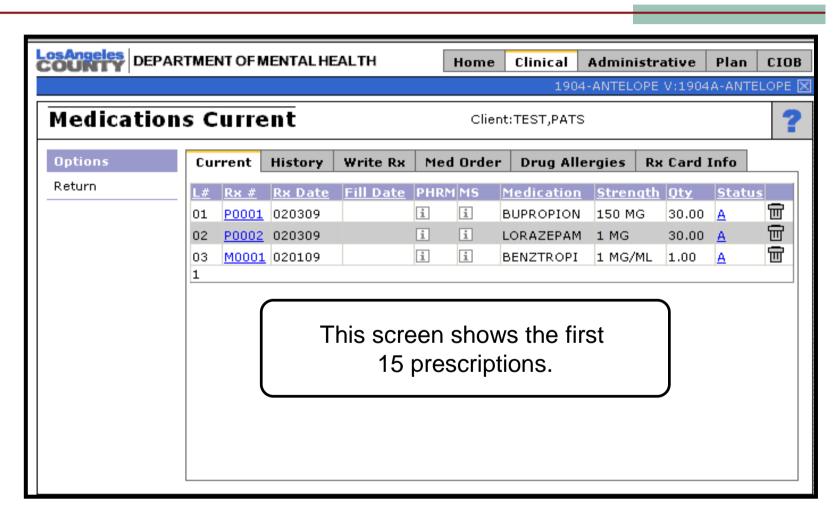
Prescribing Medications



Medications History



Medications Current

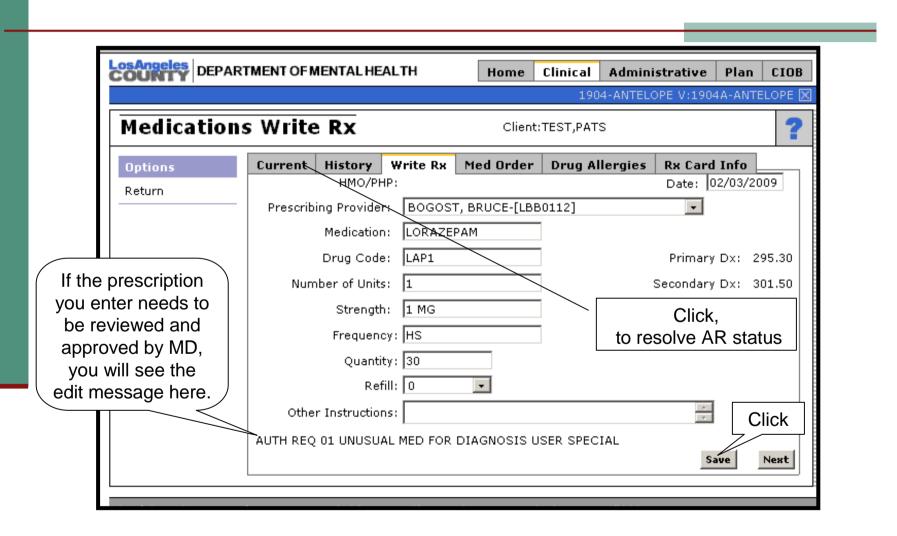


EXERCISE 14

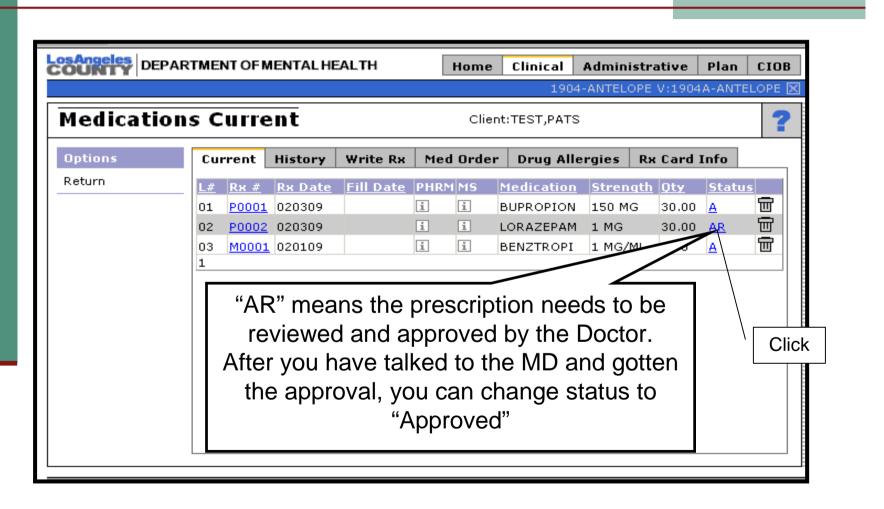
Prescribing Medications:

- Resolve an Authorization Required
- Renew/Refill a Prescription

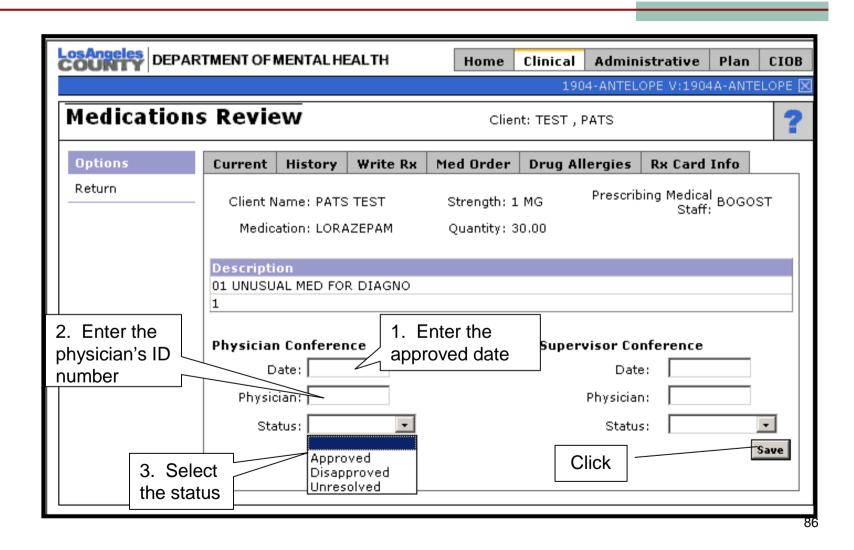
Prescribing Medications



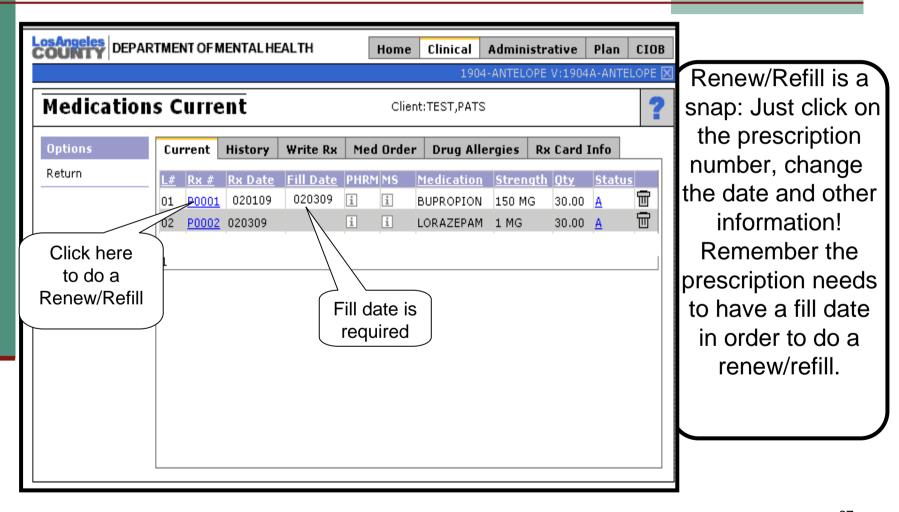
Prescribing Medications: Approval



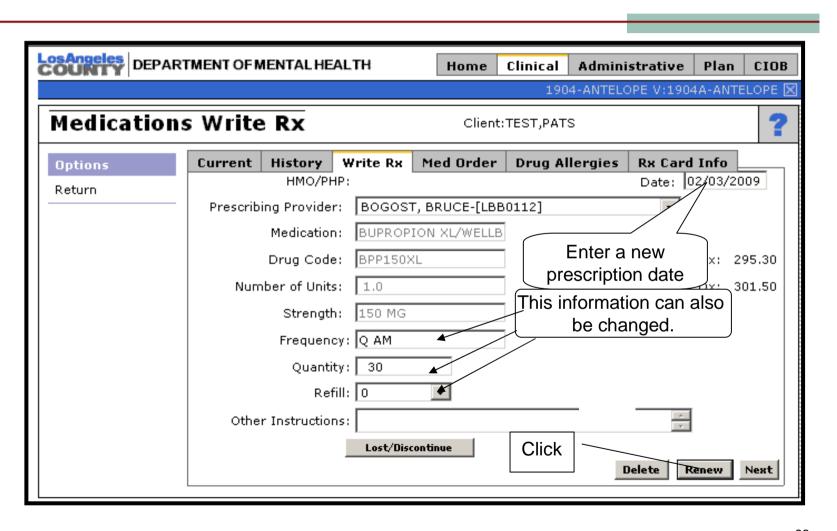
Prescribing Medications: Approval



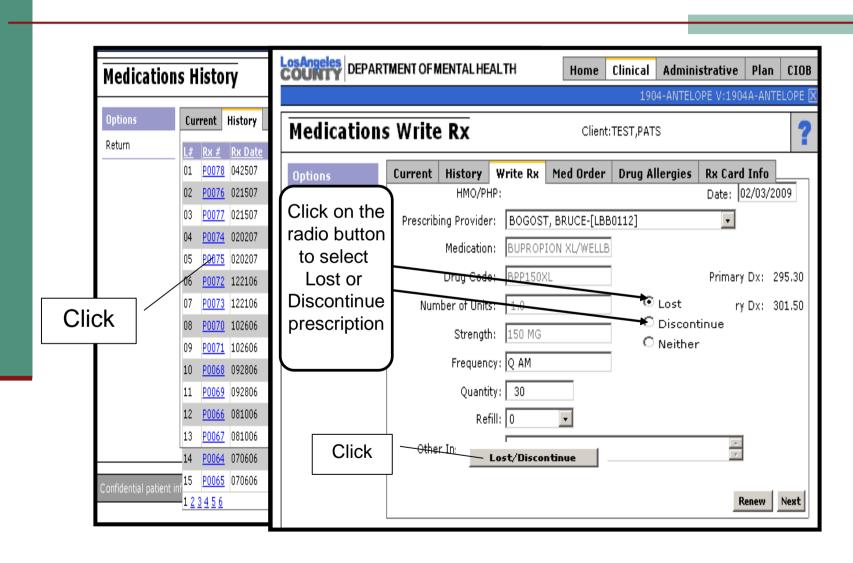
Prescribing Medications: Renew and Refill



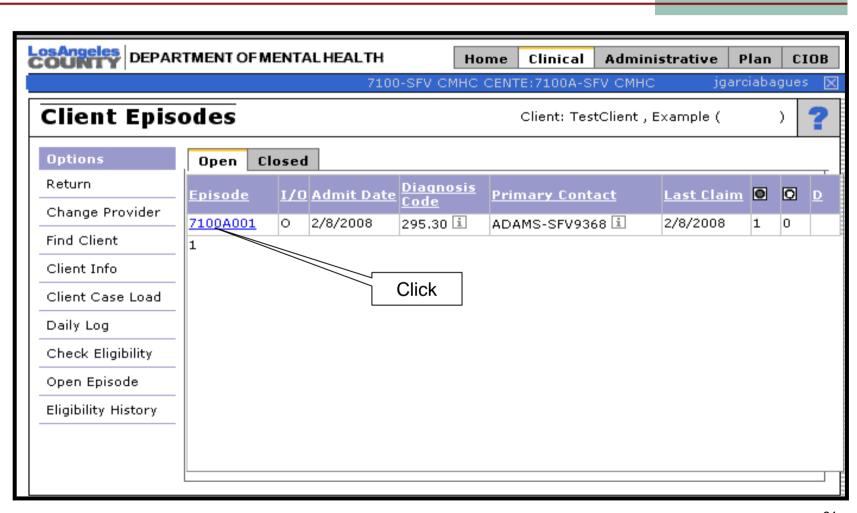
Prescribing Medications: Renew and Refill

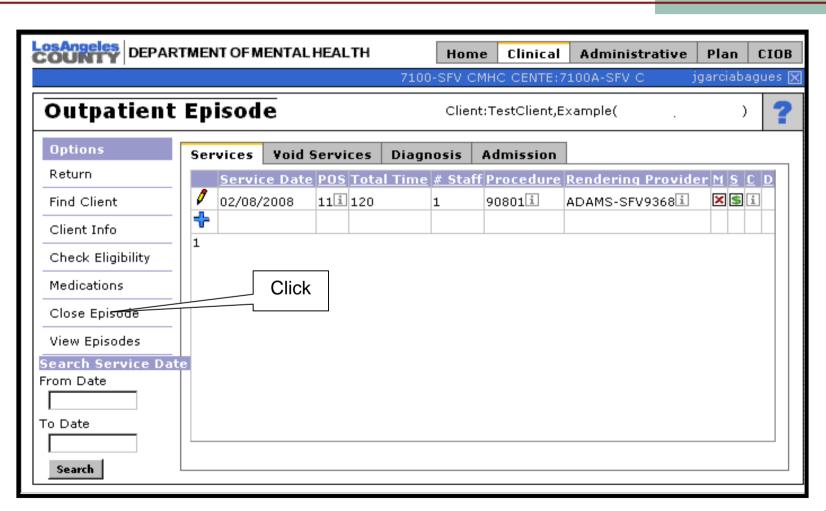


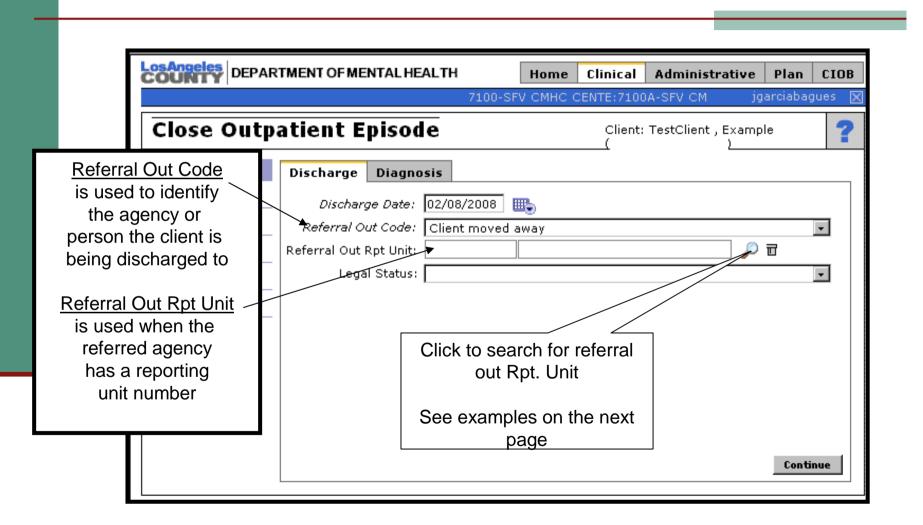
Prescribing Medications- Lost & Discontinue

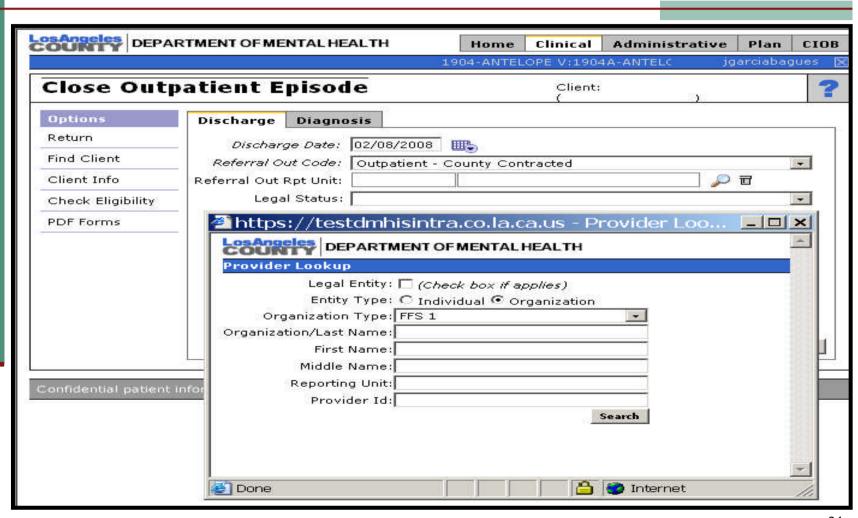


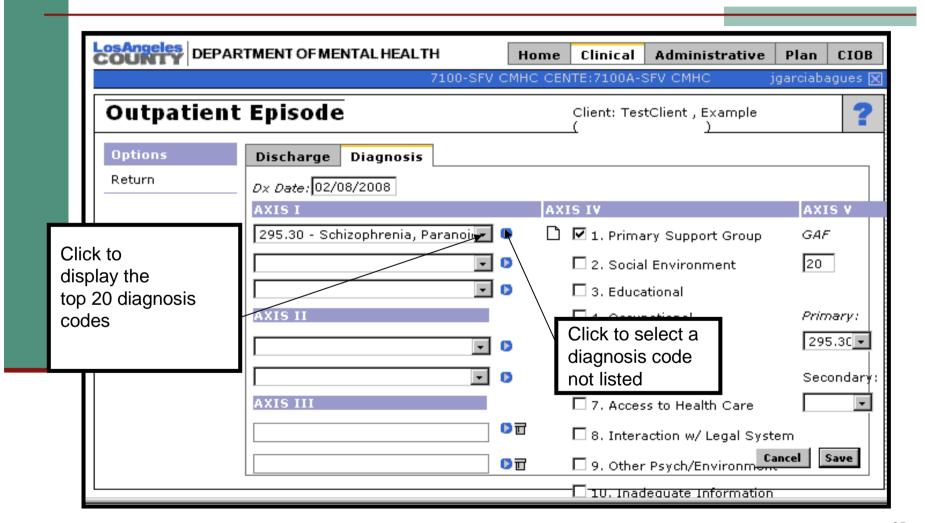
EXERCISE 15

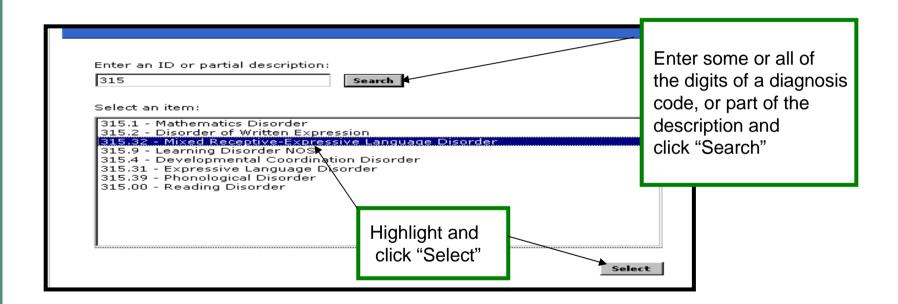


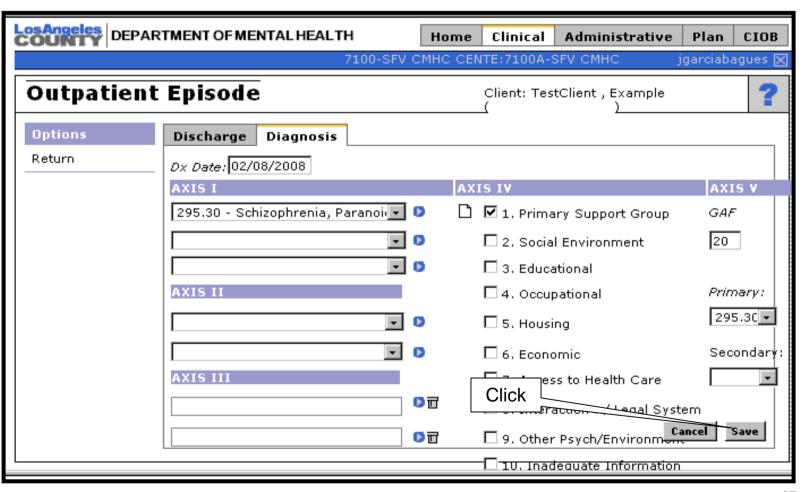


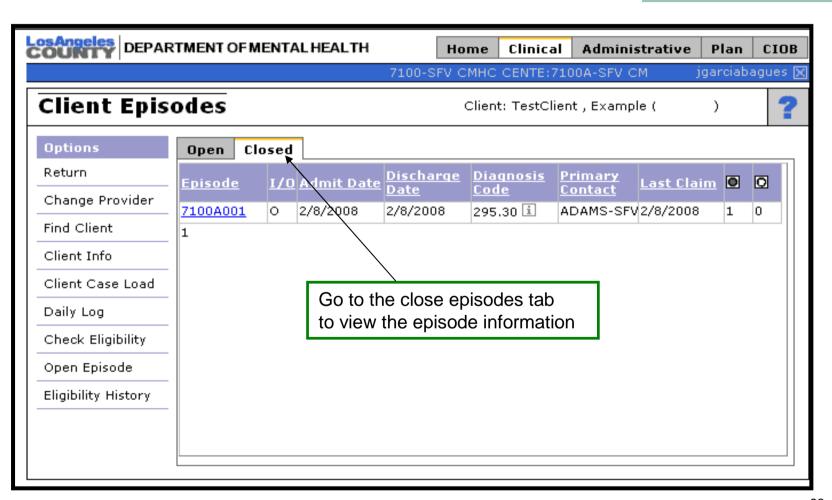










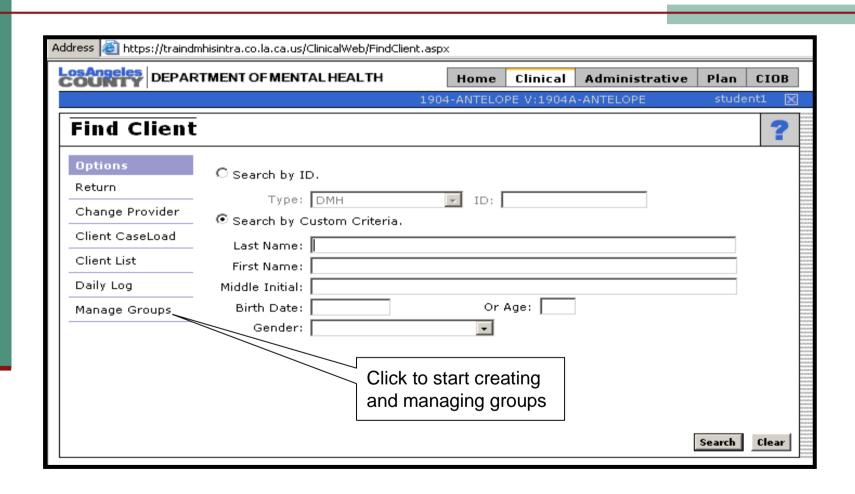


EXERCISE 16

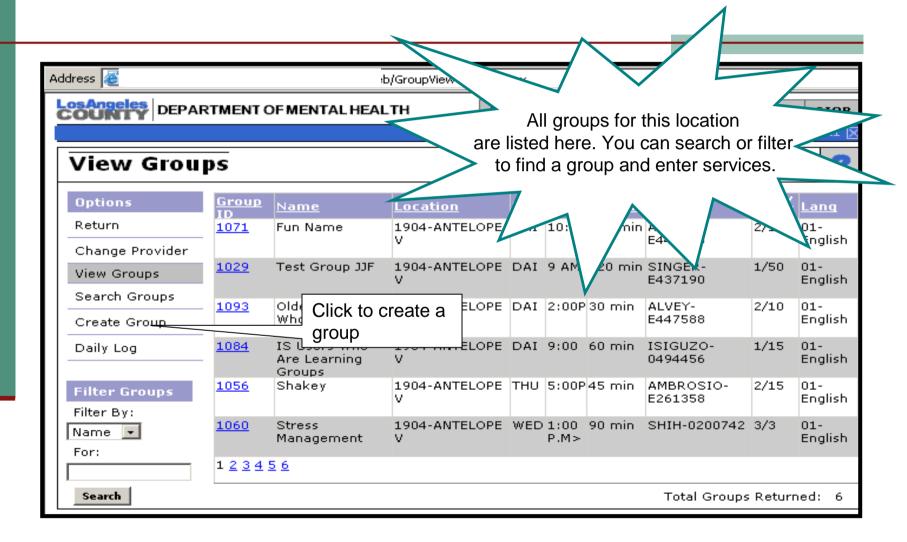
Groups:

- Create a Group
- Add a Session to a Group
- Submit Group Session Billing

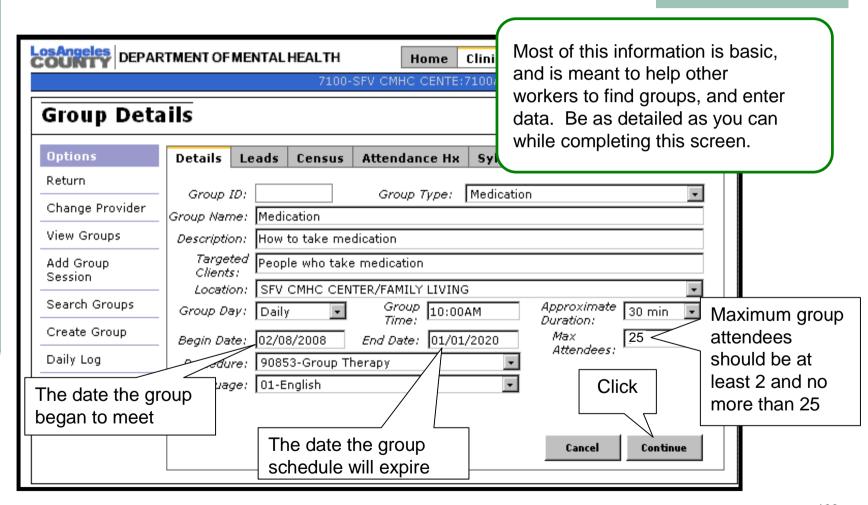
Create a Group



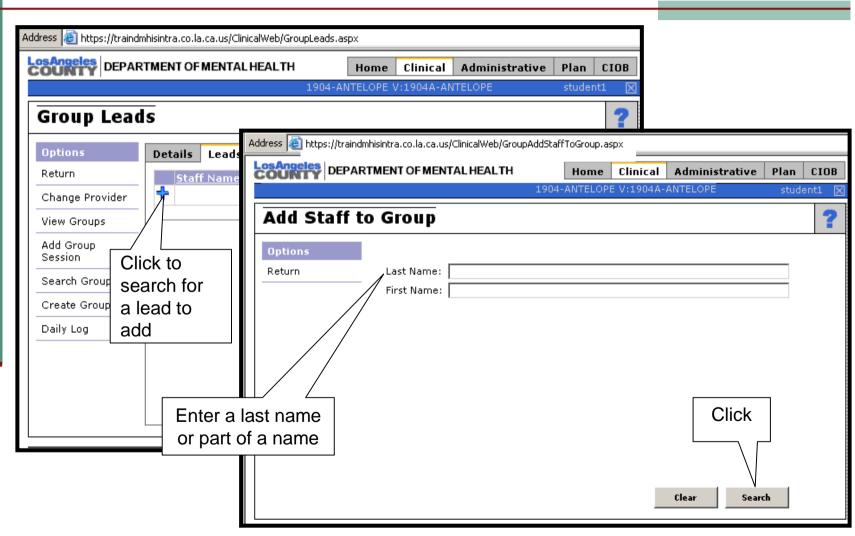
Create a Group



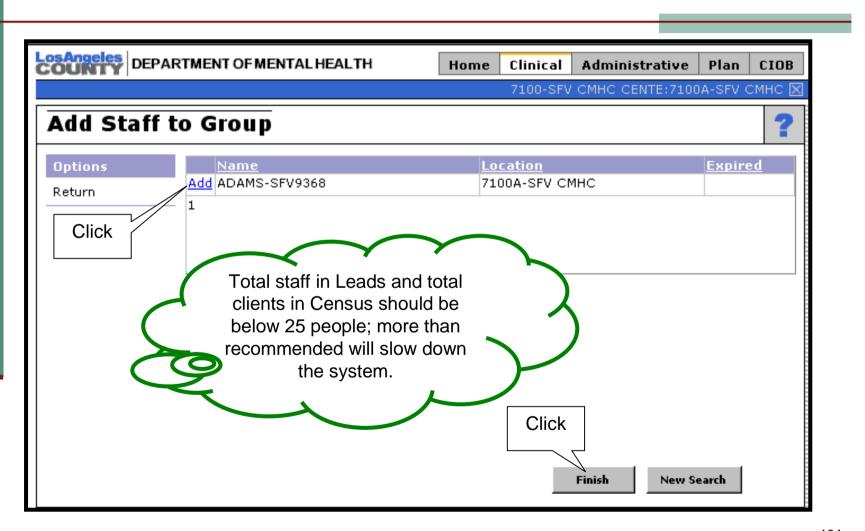
Create a Group: Details

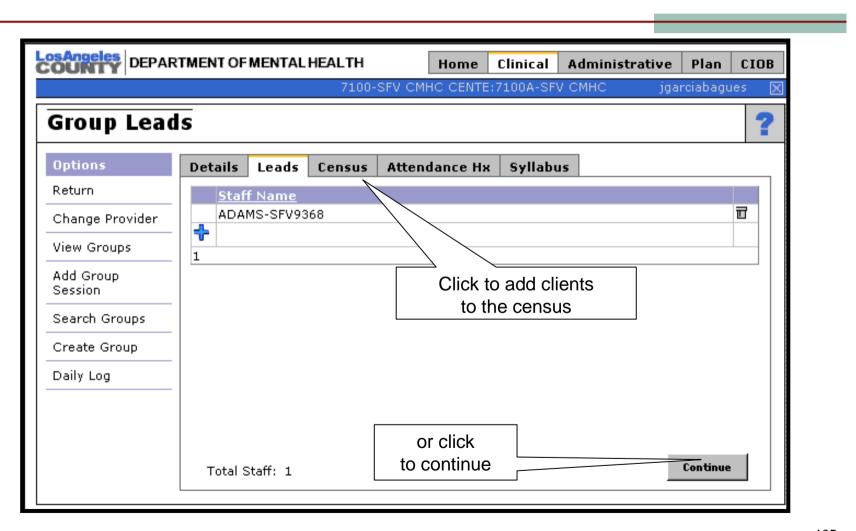


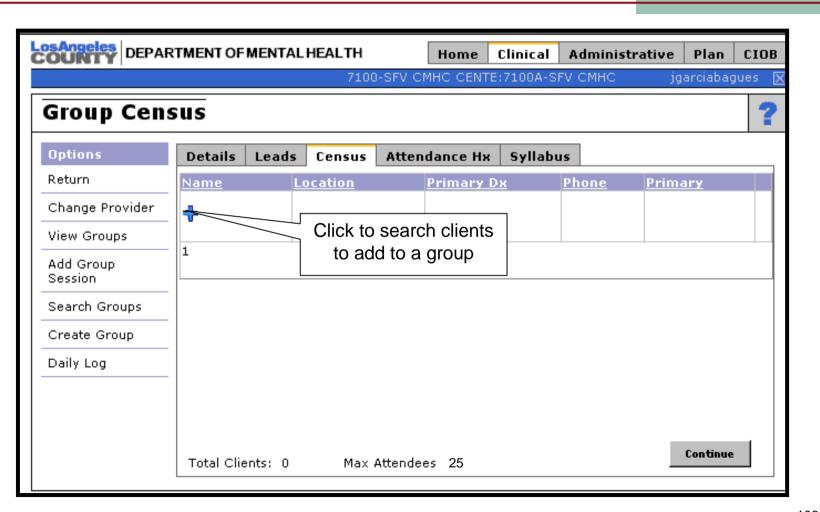
Create a Group: Leads

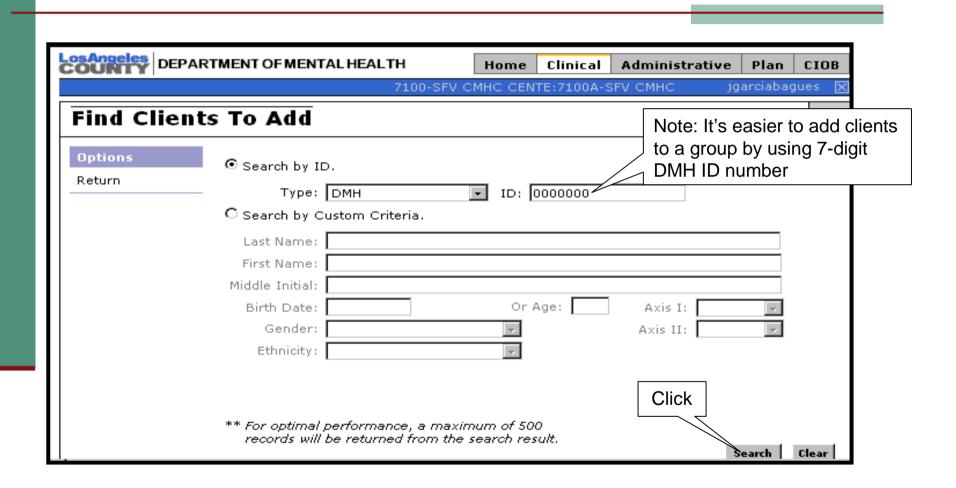


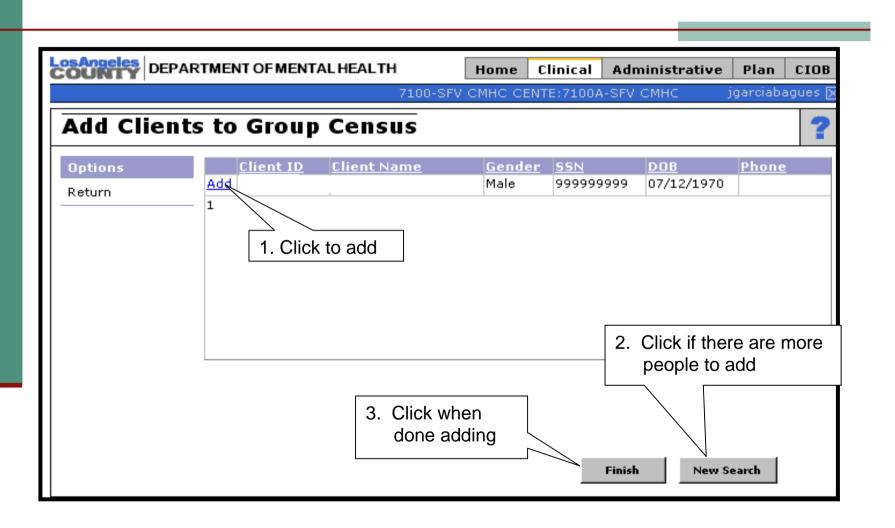
Create a Group: Leads



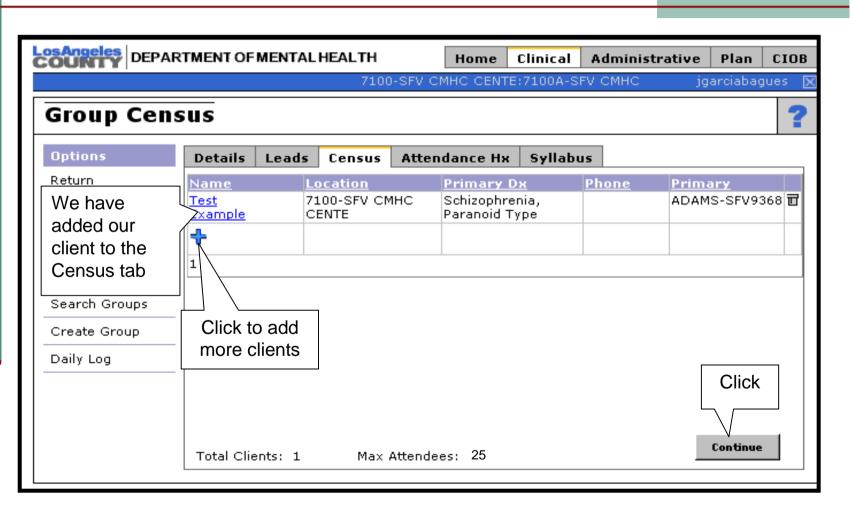








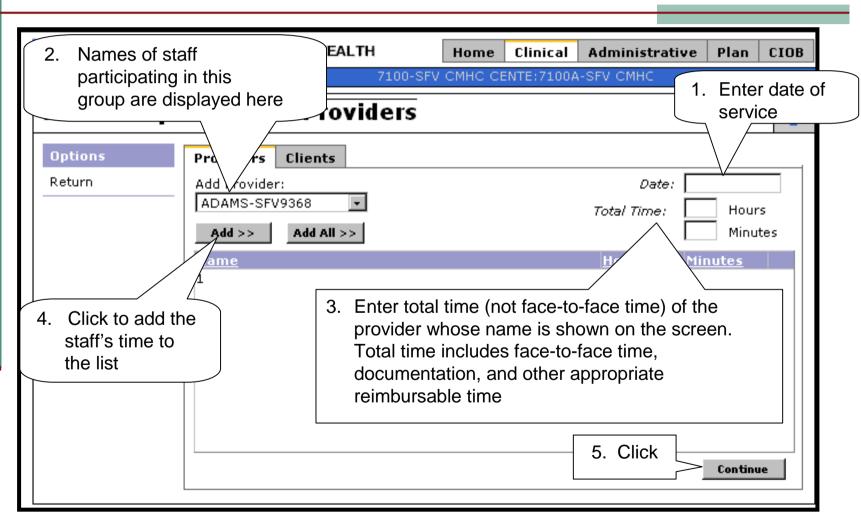
Create a Group: Census



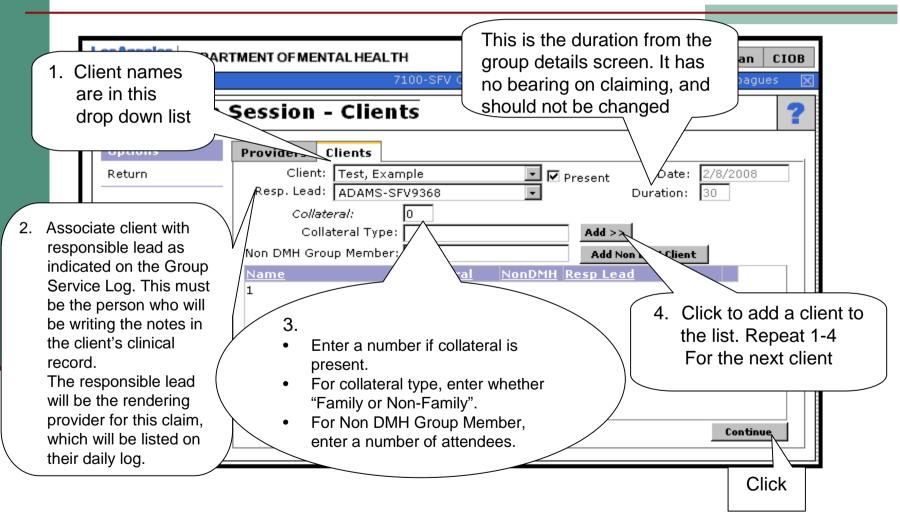
Add Group Session



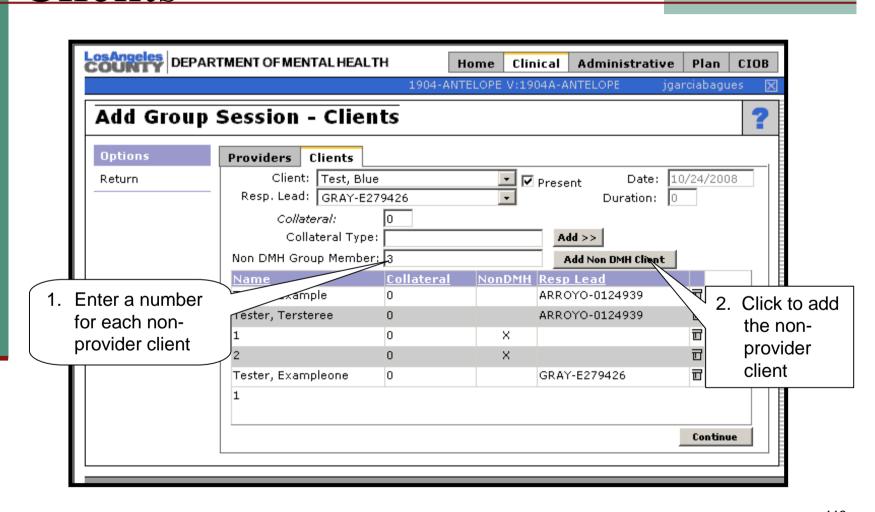
Add Group Session: Providers



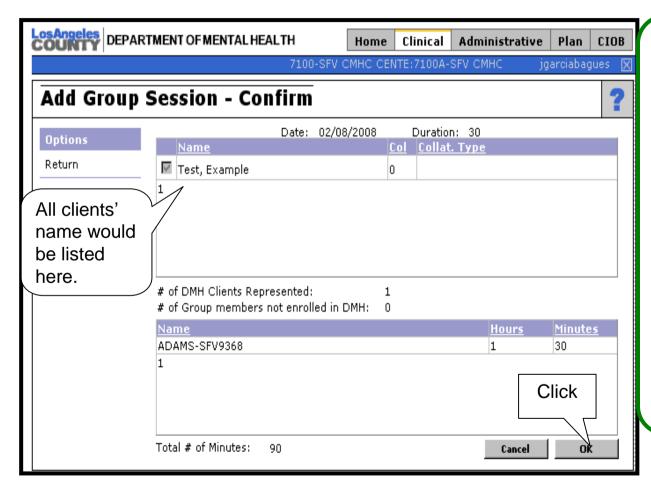
Add Group Session: Clients



Add Group Session: Non DMH Clients

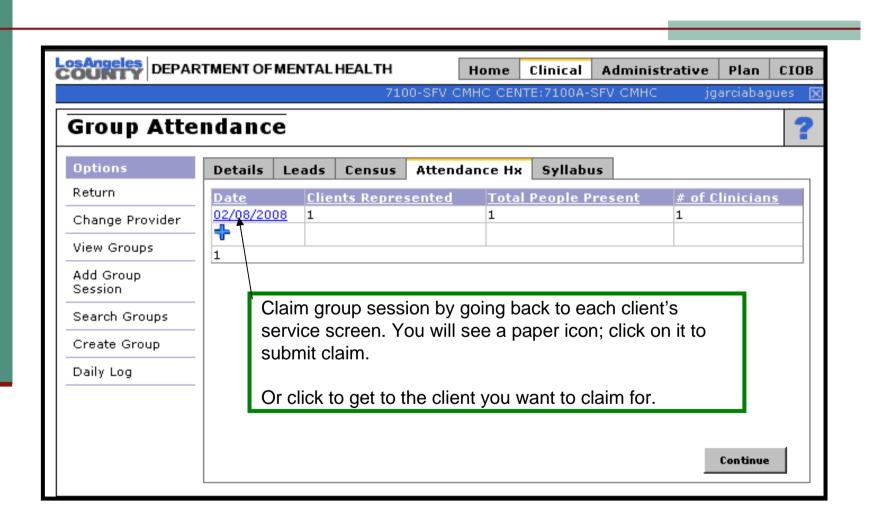


Add Group Session: Confirm

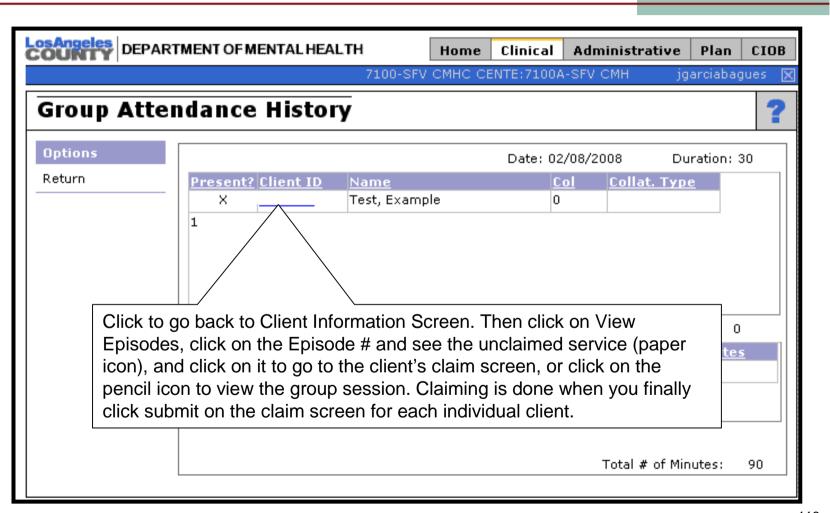


This screen summarizes who attended the session and for how long. Once you have confirmed the details, click OK to generate the service record for each client represented (in person, or by collateral). The service record will appear in each of the associated rendering provider's daily log.

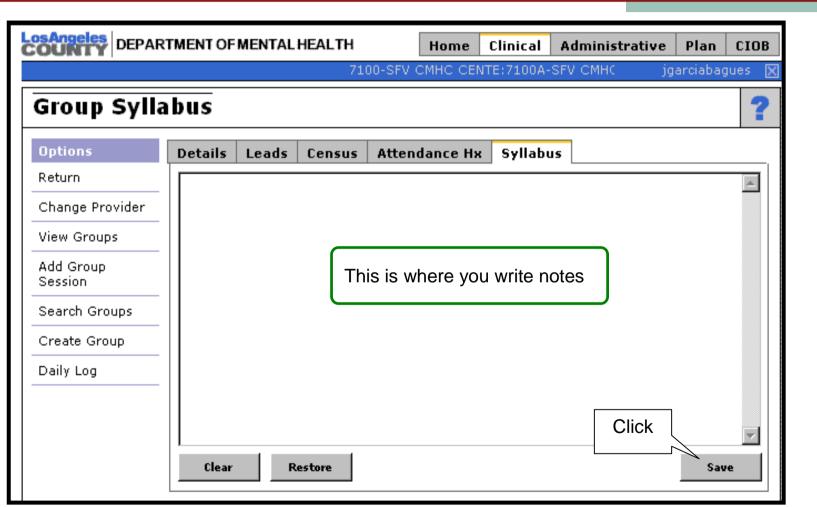
Add Group Session: Billing



Add Group Session: Billing



Group Syllabus

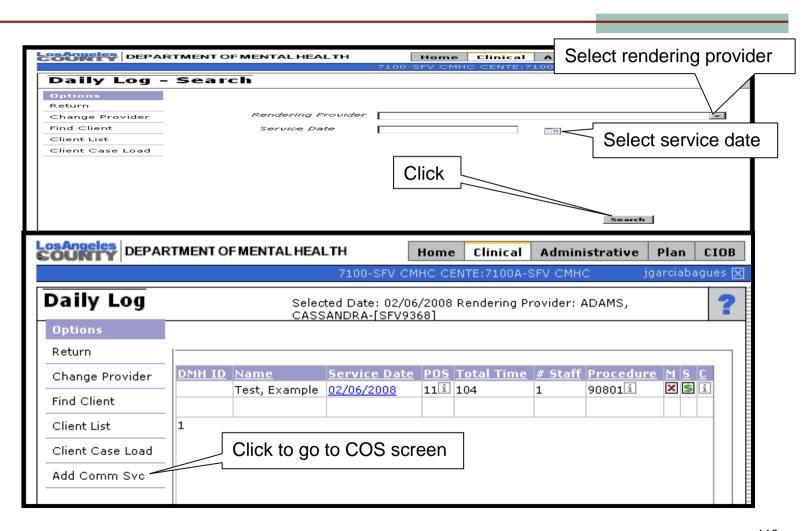


EXERCISE 17

Community Outreach Services (COS):

- Use the Daily Log
- Add a Community Service
- How to Edit Community Service

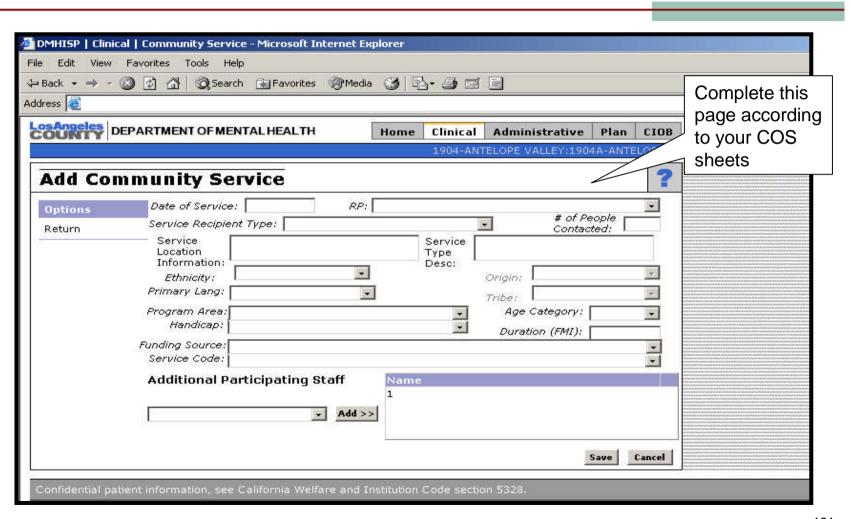
Using the Daily Log



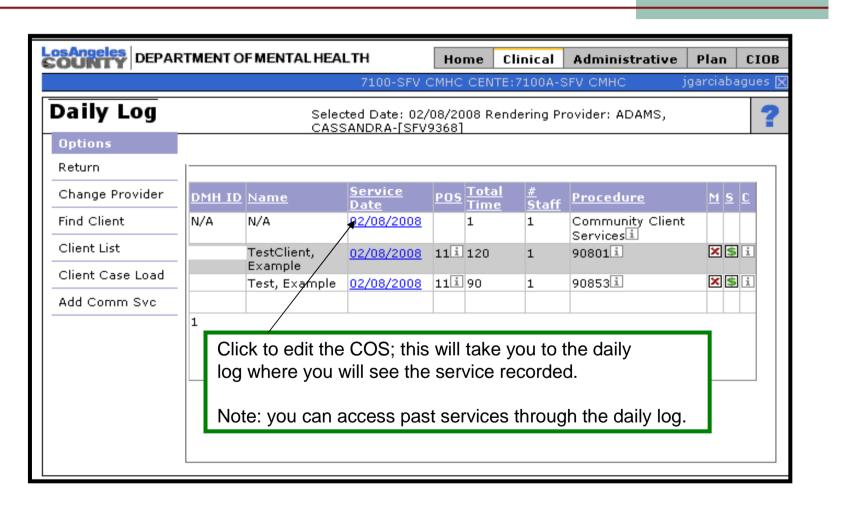
Community Outreach Services (COS)

- Entering COS is fairly simple because there is no billing involved; it's just recording an event. Billing is done by sending an invoice to the DMH Financial Services Bureau. Run the IS 220 to see your COS on a report.
- On the Find Client screen you will see the Daily Log link under the Options menu.
- In Order to enter COS you need to click on the Daily Log link; this will take you to the Daily Log Search screen where you will select the rendering provider responsible for the COS. You then need to enter the service date and click on Search.
- On the Daily Log screen, click on Add Comm. Svs. under Options.
- The Add Community Service screen will be displayed. Start entering COS.

Community Outreach Services



Community Outreach Services



Edit Community Service

